

Annual Statistics 2019

FEFCO ANNUAL STATISTICS 2019

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FEFCO ANNUAL REPORT 2019 Key Statistics

	2018	2019	% Change
Total Shipments (Millions of m ²) (including Non-Members)	44.181	44.866	1,6
Total Shipments ('000 Tonnes) (including Non-Members)	22.892	23.205	1,4
Shipments of Member Companies (Millions of m ²)	35.172	34.852	-0,9
Shipments of Member Companies ('000 Tonnes)	18.049	17.744	-1,7
Total Number of Companies (including Non-Members)	325	322	-0,9
Total Number of Plants (including Non-Members)	573	577	0,7
Average Weight of Board in g/m ² (including Non-Members)	518	517	-0,2
Total Consumption of Raw Materials ('000 Tonnes) (including Non-Members)	17.093	17.218	0,7
Consumption of White or Colored Kraftliner as % of total consumption of Raw Materials	5,6	6,1	8,2
Consumption of Brown Kraftliner as % of total consumption of Raw Materials	15,5	14,4	-7,6
Consumption of White Top Testliner as % of total consumption of Raw Materials	7,0	4,9	-42,9
Consumption of Testliner as % of total consumption of Raw Materials	27,0	30,9	12,6
Consumption of Other Recycled Liner as % of total consumption of Raw Materials	4,6	3,9	-17,9
Consumption of Semi-chemical Fluting as % of total consumption of Raw Materials	4,4	3,8	-15,8
Consumption of Recycled Fluting as % of total consumption of Raw Materials	37,7	37,4	-0,8
Total Personnel	75.576	76.714	1,5
Shipments to CONVERTERS	279,0	283,0	1,4
Shipments to TRADERS	21,0	25,0	16,0

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

	2018	2019	% Change 2018/2019	Members Only
Austria	1.028	1.028	0	Y / Y
Benelux	2.114	2.107	-0,33	N / N
croatia	n.a.	n.a.	n.a.	n.a. / n.a.
Czech Republic	1.115	1.114	-0,09	N / N
France	5.556	5.514	-0,76	N / N
Germany	10.626	10.847	2,08	N / N
Hungary	581	573	-1,38	N / N
Italy	7.004	7.136	1,88	N / N
Romania	788	799	1,40	Y / Y
Spain	5.286	5.520	4,43	N / N
Sweden	671	661	-1,49	Y / Y
Turkey	4.357	4.304	-1,22	N / N
United Kingdom	5.055	5.263	4,11	N / N
TOTAL EUROPE	44.181	44.866	1,60	

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

	2018	2019	% Change 2018/2019
Austria	478	479	0,21
Benelux	1.111	1.117	0,54
croatia	300	305	1,67
Czech Republic	544	535	-1,65
France	2.791	2.749	-1,50
Germany	5.434	5.547	2,08
Hungary	285	283	-0,70
Italy	3.886	3.933	1,21
Romania	387	390	0,78
Spain	2.772	2.914	5,12
Sweden	329	314	-4,56
Turkey	2.270	2.281	0,48
United Kingdom	2.305	2.358	2,30
TOTAL EUROPE	22.892	23.205	1,40

Shipments of Member Companies in Millions of m²

	2018	2019	% Change 2018/2019
Austria	1.028	1.028	0
Benelux	2.008	2.002	-0,30
croatia	n.a.	n.a.	n.a.
Czech Republic	755	751	-0,53
France	3.956	3.926	-0,76
Germany	7.953	7.912	-0,52
Hungary	541	533	-1,48
Italy	6.369	5.809	-8,79
Romania	788	799	1,40
Spain	3.831	4.207	9,81
Sweden	671	661	-1,49
Turkey	3.137	3.061	-2,42
United Kingdom	4.135	4.163	0,68
Membership Total	35.172	34.852	-0,90

Shipments of Member Companies in 000's Tonnes

	Membership 2018		Membership 2019	
	Tonnes	% of total shipments	Tonnes	% of total shipments
Austria	478	100,00	479	100,00
Benelux	1.055	94,96	1.061	94,99
croatia	n.a.	n.a.	n.a.	n.a.
Czech Republic	362	66,54	353	65,98
France	1.993	71,41	1.965	71,48
Germany	4.055	74,62	4.019	72,45
Hungary	265	92,98	263	92,93
Italy	3.595	92,51	3.230	82,13
Romania	387	100,00	390	100,00
Spain	2.009	72,47	2.220	76,18
Sweden	329	100,00	314	100,00
Turkey	1.635	72,03	1.585	69,49
United Kingdom	1.886	81,82	1.865	79,09
Membership Total	18.049	79,90	17.744	77,50

Total Number of Corrugating Companies (including Non-Members)

	2018	2019
Austria	6	6
Benelux	n.a.	n.a.
croatia	n.a.	5
Czech Republic	7	7
France	16	13
Germany	44	42
Hungary	7	8
Italy	43	44
Romania	11	11
Spain	72	71
Sweden	4	4
Turkey	88	89
United Kingdom	27	27
TOTAL EUROPE	325	327

Total Number of Corrugating Plants (including Non-Members)

	2018	2019
Austria	9	9
Benelux	n.a.	n.a.
croatia	n.a.	5
Czech Republic	9	9
France	62	62
Germany	124	124
Hungary	10	10
Italy	69	70
Romania	12	12
Spain	90	89
Sweden	10	10
Turkey	110	114
United Kingdom	68	68
TOTAL EUROPE	573	582

Total Number of Corrugators
(including Non-Members)

	2019			Result
	<2m	>2 <2,5m	> 2,5m	
Austria	2	6	2	10
Benelux	1	14	6	21
croatia	n.a.	n.a.	n.a.	n.a.
Czech Republic	1	7	2	10
France	n.a.	n.a.	n.a.	n.a.
Germany	5	69	29	103
Hungary	3	7	1	11
Italy	7	71	20	98
Romania	1	11	n.a.	12
Spain	10	74	11	95
Sweden	n.a.	10	n.a.	10
Turkey	n.a.	n.a.	n.a.	n.a.
United Kingdom	24	43	10	77
TOTAL EUROPE	54	312	81	447

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

	2018	2019
Austria	465	466
Benelux	526	530
croatia	n.a.	n.a.
Czech Republic	488	480
France	502	499
Germany	511	511
Hungary	491	494
Italy	555	551
Romania	491	488
Spain	524	528
Sweden	490	475
Turkey	521	530
United Kingdom	456	448
TOTAL EUROPE as weighted average	518	517

Die Cut Boxes

(as % of total shipments in m², including Non-Members & Sheet Plants)

	2018	2019
Austria	52,4	53,2
Benelux	31,9	33,4
croatia	n.a.	n.a.
Czech Republic	33,6	32,3
France	n.a.	n.a.
Germany	48,8	49,6
Hungary	58,8	58,5
Italy	n.a.	n.a.
Romania	49,0	33,0
Spain	n.a.	n.a.
Sweden	n.a.	n.a.
Turkey	n.a.	n.a.
United Kingdom	43,8	43,2
TOTAL EUROPE as weighted average	45,6	45,4

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

	2018	2019	% Change 2018/2019
Austria	550	554	0,73
Benelux	1.134	1.137	0,26
croatia	n.a.	n.a.	n.a.
Czech Republic	419	400	-4,53
France	n.a.	n.a.	n.a.
Germany	4.332	4.299	-0,76
Hungary	306	301	-1,63
Italy	4.003	4.083	2,00
Romania	412	413	0,24
Spain	3.074	3.232	5,14
Sweden	335	317	-5,37
Turkey	n.a.	n.a.	n.a.
United Kingdom	2.528	2.482	-1,82
TOTAL EUROPE	17.093	17.218	0,70

Consumption of White or Colored Kraftliner

(CCB Classification 02-04-06-08-91-98 ; as % of the total consumption of Raw Materials)

	2018	2019
Austria	9,0	7,4
Benelux	6,1	5,9
croatia	n.a.	n.a.
Czech Republic	4,0	4,7
France	n.a.	n.a.
Germany	5,0	4,9
Hungary	2,6	2,7
Italy	8,6	8,5
Romania	1,0	2,0
Spain	4,6	6,6
Sweden	1,0	3,0
Turkey	1,6	1,6
United Kingdom	4,0	5,2
TOTAL EUROPE as weighted average	5,6	6,1

Brown Kraftliner

CCB Classification 00-09-90-92-97 ; as % of the total consumption of Raw Materials)

	2018	2019
Austria	14,2	13,1
Benelux	14,1	14,2
croatia	n.a.	n.a.
Czech Republic	10,1	10,3
France	n.a.	n.a.
Germany	14,2	14,0
Hungary	14,8	13,9
Italy	18,6	16,3
Romania	10,0	12,0
Spain	14,4	13,4
Sweden	28,0	31,0
Turkey	17,0	14,9
United Kingdom	15,2	12,9
TOTAL EUROPE as weighted average	15,5	14,4

WHITE TOP TESTLINER

CCB Classification 70-71-72 ; as % of the total consumption of Raw Materials)

	2018	2019
Austria	14,8	6,7
Benelux	8,8	3,6
croatia	n.a.	n.a.
Czech Republic	9,0	7,9
France	n.a.	n.a.
Germany	7,1	7,0
Hungary	4,6	4,8
Italy	3,8	1,6
Romania	33,0	7,0
Spain	5,6	6,0
Sweden	n.a.	n.a.
Turkey	6,0	5,4
United Kingdom	n.a.	n.a.
TOTAL EUROPE as weighted average	7,0	4,9

Consumption of Testliners

(CCB Classification 10-11-12-20-21-22-30-32-38-50-55 ;
as % of the total consumption of Raw Materials)

	2018	2019
Austria	18,4	29,9
Benelux	36,7	41,2
croatia	n.a.	n.a.
Czech Republic	32,8	33,9
France	n.a.	n.a.
Germany	33,6	34,2
Hungary	34,1	34,8
Italy	16,3	22,2
Romania	6,0	30,0
Spain	21,4	27,4
Sweden	32,0	30,0
Turkey	21,2	21,5
United Kingdom	38,2	38,6
TOTAL EUROPE as weighted average	27,0	30,9

Consumption of Other Liners

(CCB Classification 53-74 ; as % of the total consumption of Raw Materials)

	2018	2019
Austria	2,3	2,4
Benelux	4,2	5,6
croatia	n.a.	n.a.
Czech Republic	3,6	2,3
France	n.a.	n.a.
Germany	1,2	1,1
Hungary	5,9	5,7
Italy	5,9	4,6
Romania	11,0	8,0
Spain	7,5	5,8
Sweden	n.a.	n.a.
Turkey	7,0	10,2
United Kingdom	n.a.	n.a.
TOTAL EUROPE as weighted average	4,6	3,9

Consumption of Semi-Chemical Fluting
(CCB Classifications 40-46-47 ; as % of the total consumption of Raw Materials)

	2018	2019
Austria	7,1	7,9
Benelux	0,9	0,9
croatia	n.a.	n.a.
Czech Republic	0,6	0,1
France	n.a.	n.a.
Germany	1,1	1,1
Hungary	2,8	2,6
Italy	9,0	8,0
Romania	4,0	6,0
Spain	6,7	4,3
Sweden	14,0	10,0
Turkey	4,2	3,6
United Kingdom	0,9	0,9
TOTAL EUROPE as weighted average	4,4	3,8

Consumption of Other Fluting (Recycled paper basis)

(CCB Classifications 41-43-44-45-60-61 ; as % of the total consumption of Raw Materials)

	2018	2019
Austria	34,2	32,6
Benelux	29,2	28,6
croatia	n.a.	n.a.
Czech Republic	39,9	40,8
France	n.a.	n.a.
Germany	37,8	37,7
Hungary	35,2	35,5
Italy	37,8	38,8
Romania	35,0	35,0
Spain	39,8	36,5
Sweden	25,0	26,0
Turkey	43,0	42,8
United Kingdom	41,7	42,4
TOTAL EUROPE as weighted average	37,7	37,4

Total Number of Personnel

	2018		2019	
	Production Employees	Total Employees	Production Employees	Total Employees
Austria	1.327	1.889	1.366	1.901
Benelux	2.587	3.880	2.634	3.695
croatia	n.a.	n.a.	162	188
Czech Republic	1.319	1.569	1.656	2.160
France	n.a.	n.a.	n.a.	n.a.
Germany	14.861	20.498	15.334	21.092
Hungary	1.340	2.014	1.339	1.998
Italy	6.300	14.190	6.420	14.460
Romania	1.700	2.300	1.750	2.375
Spain	8.568	11.225	8.480	11.266
Sweden	1.195	1.748	1.063	1.489
Turkey	6.027	7.811	5.711	n.a.
United Kingdom	10.842	16.263	10.852	16.278
TOTAL EUROPE	56.066	83.387	56.767	76.902

Production per Head in 1000 m²

	2018	2019
Austria	775	753
Benelux	817	800
croatia	n.a.	n.a.
Czech Republic	845	673
France	n.a.	n.a.
Germany	715	707
Hungary	434	428
Italy	1.112	1.112
Romania	464	457
Spain	617	651
Sweden	562	622
Turkey	723	754
United Kingdom	466	485
TOTAL EUROPE	788	790

Nominal Working Time and Productivity per Head

	Working Time [hours / year]		Productivity [m ² /Person hour]	
	2018	2019	2018	2019
Austria	1.697	1.705	456	441
Benelux	1.789	1.819	457	440
croatia	n.a.	2.008	n.a.	n.a.
Czech Republic	1.861	1.882	454	357
France	n.a.	n.a.	n.a.	n.a.
Germany	1.743	1.743	410	406
Hungary	1.848	1.848	235	232
Italy	2.024	2.040	549	545
Romania	1.873	1.832	247	249
Spain	1.768	1.768	349	368
Sweden	1.479	1.472	380	422
Turkey	2.000	1.984	361	380
United Kingdom	1.710	1.710	273	284
TOTAL EUROPE	1.799	1.818	379	375

Shipments to CONVERTERS
(in % of total shipments of m²)

	2018	2019	% Change 2018/2019
Austria	15,0	10,0	-33,33
Benelux	15,0	14,0	-6,67
croatia	n.a.	n.a.	n.a.
Czech Republic	39,0	38,0	-2,56
France	n.a.	n.a.	n.a.
Germany	6,0	6,0	0
Hungary	95,0	95,0	0
Italy	38,0	38,0	0
Romania	25,0	34,0	36,00
Spain	15,0	15,0	0
Sweden	n.a.	n.a.	n.a.
Turkey	n.a.	n.a.	n.a.
United Kingdom	31,0	33,0	6,45
TOTAL EUROPE	0,0	283,0	

Shipments to TRADERS
(in % of total shipments of m²)

	2018	2019	% Change 2018/2019
Austria	8,0	8,0	0
Benelux	n.a.	3,0	n.a.
croatia	n.a.	n.a.	n.a.
Czech Republic	n.a.	n.a.	n.a.
France	n.a.	n.a.	n.a.
Germany	8,0	9,0	12,50
Hungary	5,0	5,0	0
Italy	n.a.	n.a.	n.a.
Romania	n.a.	n.a.	n.a.
Spain	n.a.	n.a.	n.a.
Sweden	n.a.	n.a.	n.a.
Turkey	n.a.	n.a.	n.a.
United Kingdom	n.a.	n.a.	n.a.
TOTAL EUROPE	21,0	0,0	

Classification of shipment by end-use sector, as a percentage of turnover 2019

	Austria	Benelux	croatia	Czech Republic	France	Germany	Hungary	Italy	Romania	Spain	Sweden	Turkey	United Kingdom	Weighted Average
1	19,1	13,6	0,0	3,4	0,0	3,6	3,3	11,1	6,5	0,0	0,0	5,0	0,0	2,9
2	7,1	6,7	0,0	0,1	0,0	1,6	2,8	3,3	3,7	0,0	0,0	8,1	0,0	1,4
3	6,6	6,4	0,0	12,7	0,0	4,7	5,5	10,2	5,0	0,0	0,0	8,3	0,0	2,9
4	8,2	25,1	0,0	11,7	0,0	29,5	10,7	26,8	6,0	0,0	0,0	24,8	0,0	13,7
5	9,9	6,6	0,0	7,7	0,0	6,0	2,9	11,4	7,8	0,0	0,0	4,9	0,0	3,3
6	3,0	9,4	0,0	14,2	0,0	5,4	25,5	6,2	18,0	0,0	0,0	17,9	0,0	4,3
7	6,7	3,3	0,0	13,5	0,0	16,5	6,7	4,3	29,0	0,0	0,0	3,9	0,0	7,6
8	1,6	0,3	0,0	6,4	0,0	3,1	13,4	3,4	0,1	0,0	0,0	1,3	0,0	1,6
9	4,5	2,8	0,0	6,3	0,0	4,0	4,6	3,1	3,0	0,0	0,0	0,6	0,0	2,1
10	5,5	2,5	0,0	0,2	0,0	6,4	3,5	3,1	2,0	0,0	0,0	3,5	0,0	2,7
11	1,4	2,7	0,0	0,4	0,0	6,6	0,7	1,8	0,1	0,0	0,0	3,5	0,0	2,7
12	1,1	1,7	0,0	7,3	0,0	5,3	0,0	4,0	0,1	0,0	0,0	0,0	0,0	2,3
13	3,4	8,4	0,0	6,9	0,0	4,3	11,3	9,8	6,7	0,0	0,0	5,5	0,0	3,0
14	21,9	10,5	0,0	9,2	0,0	2,9	9,1	1,5	12,0	0,0	0,0	12,7	0,0	2,8
Total	100,0	100,0	n.a.	100,0	n.a.	99,9	100,0	100,0	100,0	n.a.	n.a.	100,0	n.a.	

Categories for classification:

- | | |
|----------------------|-----------------------------|
| 1 Produce | 8 IT, Communication & Audio |
| 2 Fresh meat & fish | 9 Capital goods |
| 3 Dairy products | 10 Auxiliary goods |
| 4 Processed food | 11 Logistics |
| 5 Beverages | 12 Packaging for ecommerce |
| 6 FMCG | 13 Other paper products |
| 7 Long lasting goods | 14 Other excluding sheets |

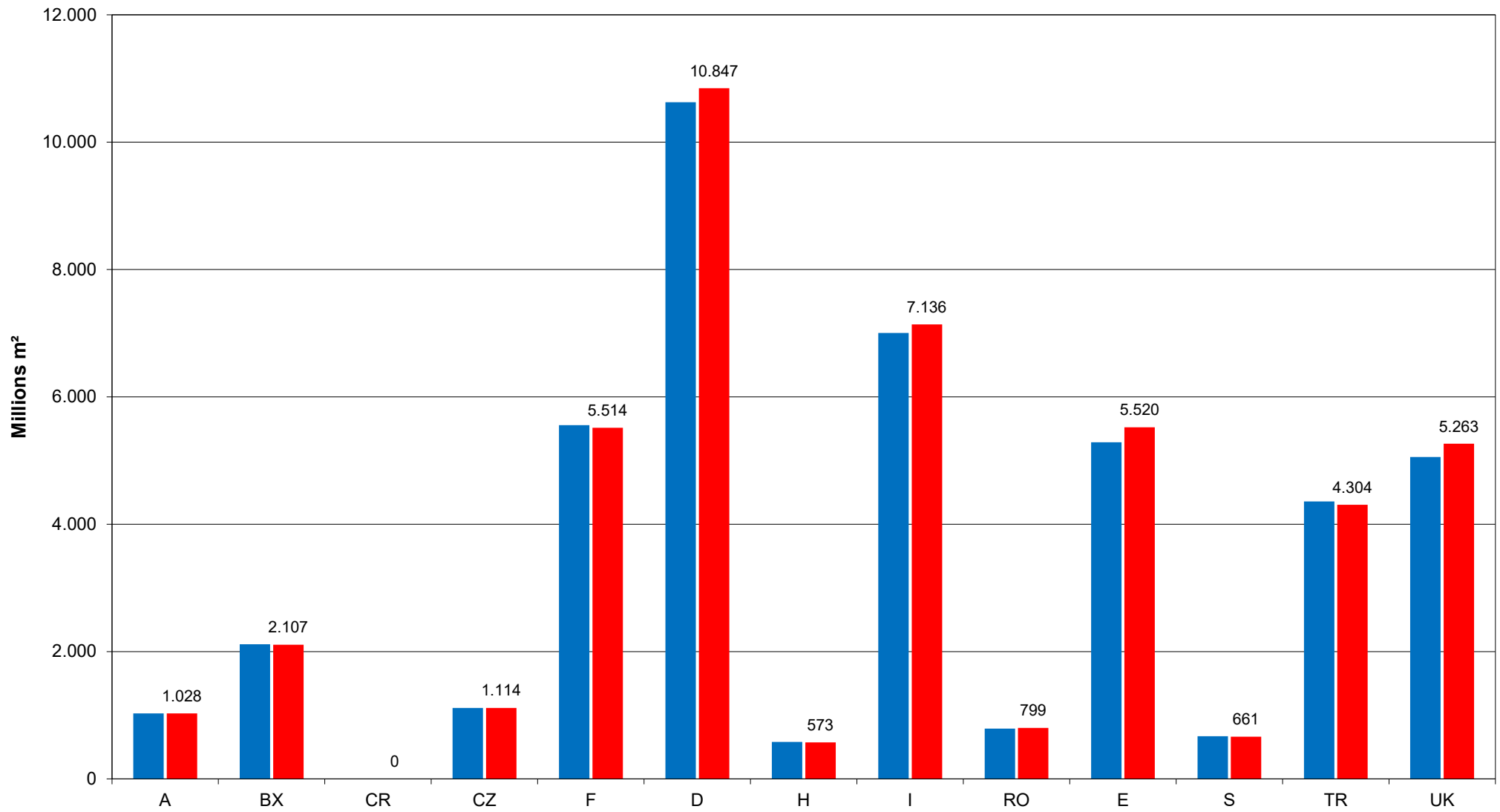
Fluting Types in % of Total Shipments 2019

	B-flute	C-flute	BC-flute	E-flute	Micro-FI	Others
Austria	36,6	15,1	11,0	20,5	1,3	15,5
Benelux	47,5	12,9	10,9	5,4	0,6	22,7
croatia	40,0	23,2	19,4	14,1	0,0	3,3
Czech Republic	48,8	7,7	12,9	17,1	0,1	13,4
France	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Germany	35,8	11,9	15,9	14,5	3,7	18,2
Hungary	38,5	15,6	16,6	16,4	0,8	12,1
Italy	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Romania	36,0	27,0	18,0	11,0	0,0	8,0
Spain	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Sweden	37,0	42,0	0,0	0,0	0,0	21,0
Turkey	18,4	19,6	52,3	6,9	0,0	2,8
United Kingdom	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Total Europe as weighted average	22,8	11,4	16,9	7,5	0,4	7,1

Countries	% of the Products by Number of Printing Colours										% Changes				
	2018					2019					2018 / 2019				
	0	1	2	3	> 3	0	1	2	3	> 3	0	1	2	3	> 3
Austria	35,0	35,0	10,3	8,4	11,3	35,4	34,2	11,0	8,4	11,0	1,1	-2,3	6,8	0,0	-2,7
Benelux	35,0	39,2	14,5	5,5	5,8	34,7	39,3	14,6	5,6	5,8	-0,9	0,3	0,7	1,8	0,0
croatia	0,0	0,0	0,0	0,0	0,0	61,3	18,2	8,3	8,3	3,9	n.a.	n.a.	n.a.	n.a.	n.a.
Czech Republic	26,9	43,9	16,9	6,7	5,6	28,1	41,2	15,3	6,9	8,5	4,5	-6,2	-9,5	3,0	51,8
France	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Germany	27,6	33,8	15,1	9,4	14,1	27,5	33,3	14,7	9,7	14,8	-0,4	-1,5	-2,6	3,2	5,0
Hungary	42,5	29,8	11,7	7,0	9,0	36,7	32,4	11,5	7,9	11,5	-13,6	8,7	-1,7	12,9	27,8
Italy	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Romania	39,0	37,0	13,0	9,0	2,0	36,0	33,0	14,0	10,0	7,0	-7,7	-10,8	7,7	11,1	250,0
Spain	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Sweden	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Turkey	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
United Kingdom	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

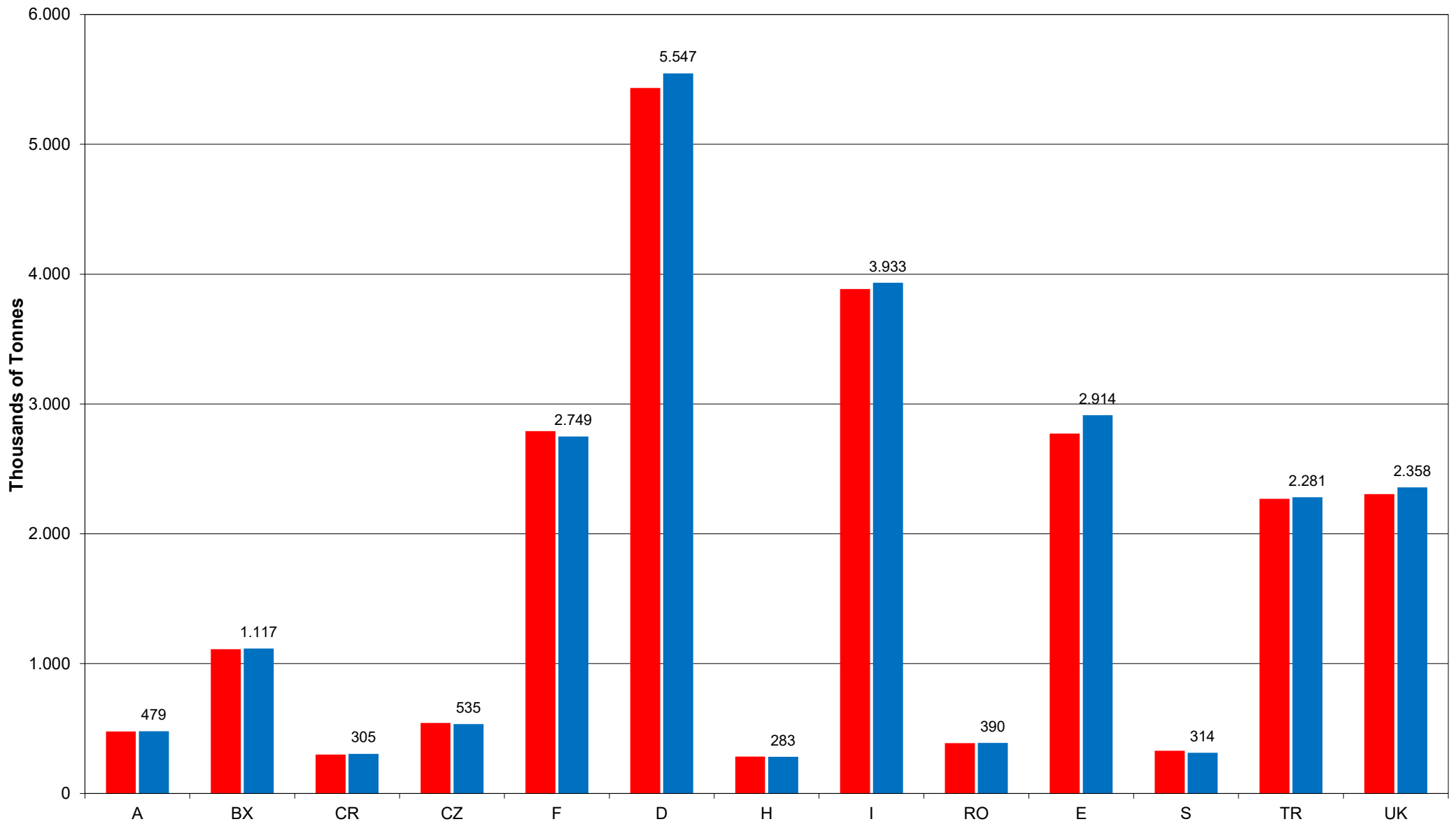
Shipments in Millions m²

■ 2018 ■ 2019



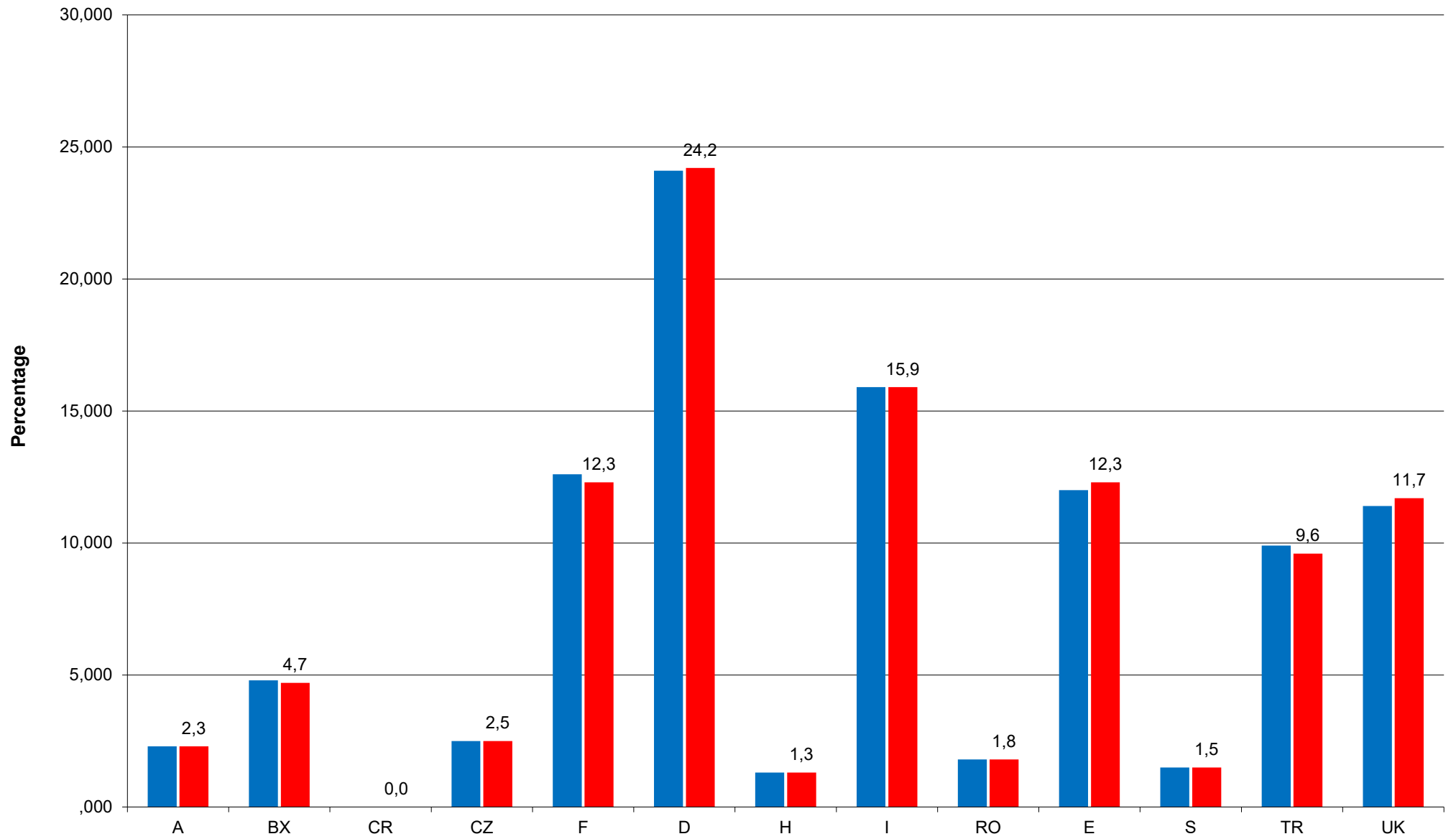
Shipments in '000 Tonnes

■ 2018 ■ 2019

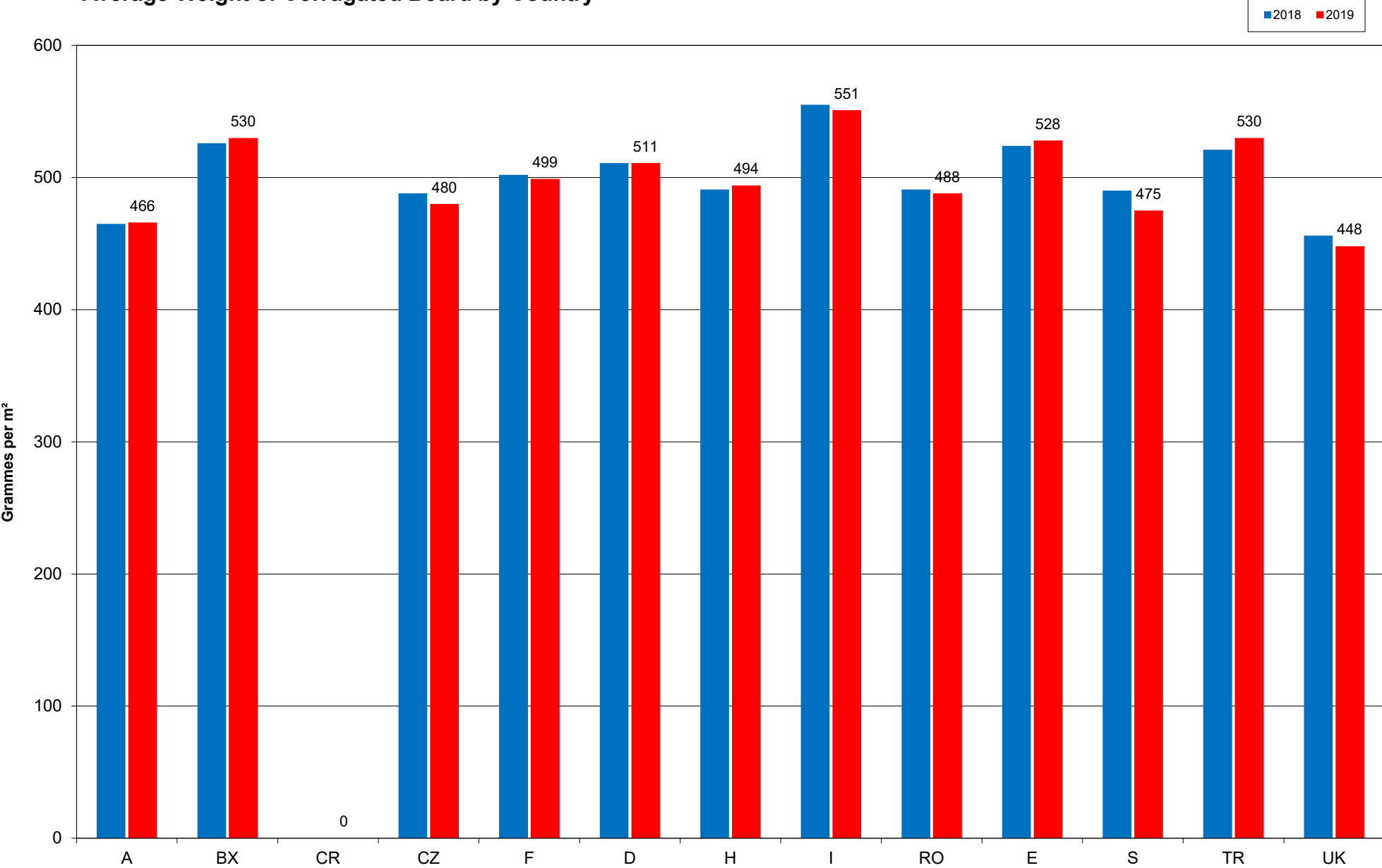


Relative Share of Total Shipments by Country (based on m²)

2018 2019



Average Weight of Corrugated Board by Country



Fluting Type

