

STATISTICS ANNUAL REPORT 2024



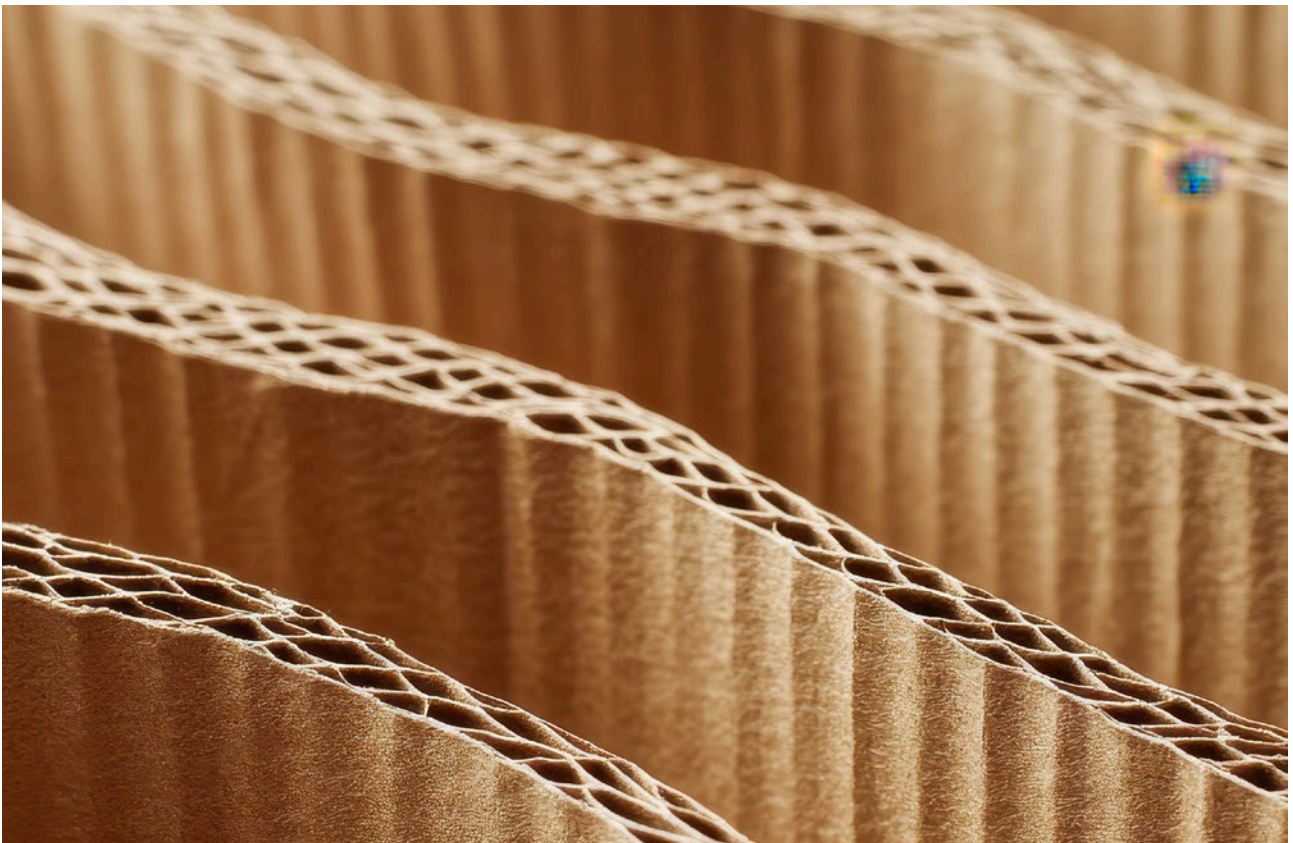
FEFCO (EUROPEAN FEDERATION OF CORRUGATED BOARD MANUFACTURERS)

The **European Federation of Corrugated Board Manufacturers (FEFCO)** was established in **1952** as a non-profit organisation representing the collective interests of the corrugated packaging industry across Europe. Its foundation came at a pivotal moment in European history, when economies were rebuilding, trade was expanding, and the demand for efficient, durable, and sustainable packaging solutions was rapidly accelerating.

From its earliest years, FEFCO acts as a unifying voice for national associations and companies within the corrugated sector. Its mission is to harmonise practices, promote technological progress, and safeguard the industry's interests at a European level. A significant milestone was the creation of FEFCO European statistics in 1996, which became a trusted benchmark for market data and has since served as a reference for many sister organisations worldwide.

Since 2018, the **FEFCO Statistics Workgroup** continues this legacy by providing the industry with a reliable, source of knowledge. The workgroup efforts extend to the development of a **decision-support dashboard**, designed to empower industry leaders with high-quality insights for long-term strategic planning and day-to-day operations. In doing so, FEFCO strengthens the credibility of the sector, supports informed decision-making, and advances sustainable growth across Europe and beyond.

Today, FEFCO represents a dynamic and forward-looking industry. In **2024**, 17 European National associations produced **49 billion square metres of board**, with **270 companies operating 537 plants** and providing employment for **71,364 people** (based on FEFCO members data). Corrugated packaging is inherently **circular by nature**: derived from renewable resources, recycled widely and effectively, and continuously improved to reduce environmental impact. Between **1996 and 2024**, the average box weight decreased by **9%**, while the average recycled content reached **88%**, demonstrating the industry's ongoing commitment to innovation, efficiency, and sustainability.



FEFCO MEMBERS 2024

	Forum Wellpappe Austria - PROPAK Austria	Austria
	CBA - Corrugated Benelux Association	Belgium & Netherlands
	UHPVK - Association of Croatian Corrugated Board Producers	Croatia
	SVVL - Svaz výrobcu vlnitých lepenek	Czech Republic
	FCBA - Finnish Corrugated Board Association	Finland
	COF - Carton Ondule de France	France
	VDW - Verband der Wellpappen-Industrie e.V.	Germany
	HPPA - Hellenic Paper Packaging Association	Greece
	MAHUSZ - Hungarian Federation of Corrugated Board Manufacturers	Hungary
	GIFCO - Gruppo Italiano Fabbricanti Cartone Ondulato	Italy
	NBF - Association of Norwegian Corrugated Board Manufacturers	Norway
	SPP - Warsaw Office	Poland
	ANIPC - Associação Nacional dos Industriais do Papel e Cartão	Portugal
	ROMPAP - Romanian Pulp and Paper Association	Romania
	AFCO - Asociación Española De Fabricantes De Envases y Embalajes de Carton Ondulado (AFCO)	Spain
	Arbio AB/SWIF	Sweden
	CPI - Confederation of Paper Industries Ltd	United Kingdom

DEFINITIONS

Group or Corporation	Association of companies located in one or several EU countries and connected by legal and/or financial links. A group of companies can have more than one decision-making centre, especially for policy on production, sales and profit.
Company	A legal unit, having one or more plants producing corrugated board.
Corrugated plant	A manufacturing facility at a location producing corrugated board on one or more corrugators, non-regarding whether conversion to boxes etc. is executed at the same location.
Sheet feeder	A corrugated plant converting Paper to corrugated Board.
Sheet plant	A corrugated packaging producer converting Corrugated Board to Packaging.
Converting plant/box plant	See Sheet Plant.
Export	Export of corrugated board refers to the international shipment and sale of products made from corrugated paper or board. This includes corrugated boxes, sheets, rolls, cases, and packaging materials, which are delivered to customers located outside the borders of the exporting country, whether within or outside the European Union (EU).
Production in m ² and tonnes	Net production in m ² and tonnes of corrugated.
Raw materials	Containerboard/paper used for corrugated board.
Share of association members in total production in m ²	This term refers to the percentage of the total corrugated board production in a country that is attributed to the member companies of the national association.
Production losses (Waste) in % of production	Wastepaper versus converted paper.

METHODOLOGY, CONSISTENCY AND CONFIDENTIALITY

The statistics presented in this report are compiled annually from data submitted by 17 National Associations of corrugated board manufacturers, under the supervision of the FEFCO Statistics Workgroup.

Where data are missing, FEFCO provides estimates, provided that the countries concerned agree to such estimations. If countries do not accept estimations and fail to report their figures for the years in question, those countries are excluded from the report. Explanatory notes are added to each section of the report for clarification.

It happens that figures from previous years are revised and therefore may differ from those published in earlier editions.

Responsibility for the accuracy of the data and compliance with EU competition law lies with the national associations. Each has signed a declaration confirming that the data supplied to FEFCO for the purpose of this Statistics project are fully in line with EU Competition Law.



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Key Statistics

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FEFCO ANNUAL REPORT 2024 Key Statistics

	2023	2024	Change 2024/2023 (%)
Production of Corrugated Board in millions of m ² - including non-members	47.564	49.002	3,0%
Production of Corrugated Board in '000 tonnes - including non-members	23.709	24.336	2,6%
Industry Structure: Number of Companies with Corrugators - incl. non-members	267	270	1,1%
Industry Structure: Number of Plants with Corrugators - including non-members	536	537	0,2%
Industry Structure: Number of Corrugators - including non-members	481	484	0,6%
Average weight of board in g/m ² - including non-members	498,5	496,6	-0,4%
Exports of Corrugated Products in millions of m ² - including non-members	4.054	4.045	-0,2%
Exports of Corrugated Products in '000 tonnes - including non-members	3.167	3.192	0,8%
Turnover in Mio. of Euros - including non-members	20.093	19.189	-4,5%
Raw Materials: Total Consumption in '000 tonnes - members only	14.599	15.082	3,3%
Raw Materials: Total Consumption in '000 tonnes - including non-members	24.701	25.220	2,1%
Total Number of Employees - members only	70.471	71.364	1,3%
Nominal Number of working days per calendar year - members only	242	243	0,5%
Nominal Number of working hours per employee per calendar year - members only	1.830	1.844	0,8%
Production per production head in millions of m ² - members only	0,651	0,666	2,4%

Production of Corrugated Board

in millions of m2 - members only

	2023	2024	% Change 2024 vs 2023
Austria	725	715	-1,3%
Benelux	1.945	1.992	2,4%
Croatia	326	323	-0,9%
Czech Republic	806	870	7,9%
Finland	240	231	-3,8%
Germany	7.860	7.945	1,1%
Greece	555	585	5,5%
Hungary	521	545	4,6%
Italy	4.822	4.991	3,5%
Norway	232	236	1,9%
Poland	4.226	4.622	9,4%
Portugal	748	783	4,8%
Romania	890	999	12,2%
Spain	4.339	4.498	3,7%
Sweden	558	586	5,0%
United Kingdom	4.319	4.416	2,2%
Total countries*	33.111	34.337	3,7%
Total countries**	32.871	34.106	3,8%

* including reported and estimated data for both years

** including reported data for both years

Finland 2024 : Same rate as 2023 including non members

Production of Corrugated Board

in '000 tonnes - members only

	2023	2024	% Change 2024 vs 2023
Austria	358	360	0,4%
Benelux	1.001	1.029	2,8%
Croatia	148	147	-0,7%
Czech Republic	374	403	7,8%
Finland	111	104	-6,1%
Germany	3.938	3.968	0,8%
Greece	274	284	3,7%
Hungary	253	271	7,1%
Italy	2.644	2.732	3,3%
Norway	107	102	-4,6%
Poland	2.024	2.227	10,0%
Portugal	382	362	-5,3%
Romania	427	475	11,2%
Spain	2.167	2.270	4,7%
Sweden	262	272	3,8%
United Kingdom	1.952	1.992	2,0%
Total countries*	16.423	16.997	3,5%
Total countries**	16.312	16.893	3,6%

* including reported and estimated data for both years

** including reported data for both years

Finland 2024 : Shipment in m2 x 0,451 g/m2 (average weight in mail)

Production of Corrugated Board

Production losses in 000' tonnes - members only

	2023	2024	% Change 2024 vs 2023
Austria	25,1	25,2	0,4%
Benelux	138,0	235,0	70,3%
Croatia	19,0	18,0	-5,3%
Czech Republic	72,0	79,0	9,7%
Finland	20,0	19,2	-4,1%
Germany	685,0	679,0	-0,9%
Greece	27,0	30,0	11,1%
Hungary	47,0	47,0	0,0%
Italy	237,0	246,0	3,8%
Norway	9,3	8,9	-4,6%
Poland	255,0	276,0	8,2%
Portugal	26,8	25,4	-5,3%
Spain	236,5	247,7	4,7%
Sweden	51,0	51,0	0,0%
United Kingdom	136,7	139,4	2,0%
Total countries*	1.985,3	2.126,7	7,1%
Total countries**	1.757,8	1.899,6	8,1%

* including reported and estimated data for both years

** including reported data for both years

Austria 2023 : 7% of production (ton)

Austria 2024 : 7% of production (ton)

Croatia 2023 : original data divided by 1000

Croatia 2024 : original data divided by 1000

Finland 2024 : Same rate as 2023

Portugal 2023 : 7% of production

Portugal 2024 : 7% of production

United Kingdom 2023 : 7% of production

United Kingdom 2024 : 7% of production

Production of Corrugated Board

in millions of m² - including non-members

	2023	2024	% Change 2024 vs 2023
Austria	941	964	2,5%
Benelux	2.626	2.673	1,8%
Croatia	346	342	-1,2%
Czech Republic	1.155	1.247	8,0%
Finland	277	266	-4,0%
France	5.550	5.573	0,4%
Germany	11.022	11.341	2,9%
Greece	694	731	5,3%
Hungary	584	585	0,2%
Italy	7.675	7.888	2,8%
Norway	232	236	1,9%
Poland	4.601	4.824	4,9%
Portugal	823	862	4,8%
Romania	890	999	12,2%
Spain	5.629	5.836	3,7%
Sweden	558	586	5,0%
United Kingdom	4.902	5.013	2,2%
Total countries*	48.505	49.966	3,0%
Total countries**	47.564	49.002	3,0%

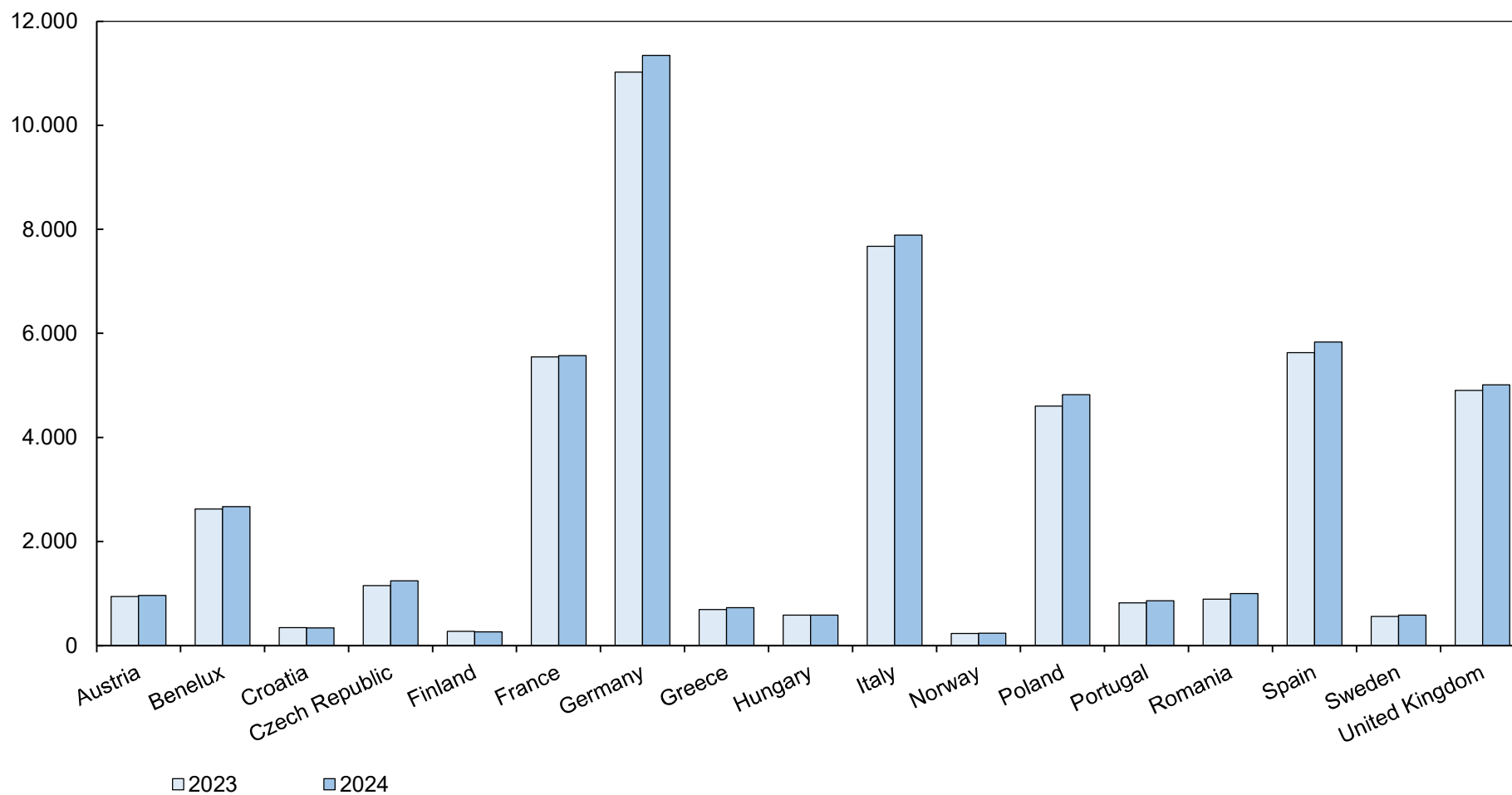
* including reported and estimated data for both years

** including reported data for both years

Austria 2023 : tons * average Weight 2023 (Member company onlly)

Austria 2024 : tons * average Weight 2024 (Member company onlly)

Production of Corrugated Board in millions of m² including non-members



Production of Corrugated Board

in '000 tonnes - including non-members

	2023	2024	% Change 2024 vs 2023
Austria	465	485	4,3%
Benelux	1.352	1.380	2,1%
Croatia	159	158	-0,6%
Czech Republic	536	577	7,7%
Finland	125	120	-4,0%
France	2.502	2.505	0,1%
Germany	5.499	5.609	2,0%
Greece	343	355	3,5%
Hungary	285	291	2,1%
Italy	4.083	4.173	2,2%
Norway	107	102	-4,6%
Poland	2.237	2.349	5,0%
Portugal	421	399	-5,3%
Romania	427	475	11,2%
Spain	2.816	2.945	4,6%
Sweden	262	272	3,8%
United Kingdom	2.216	2.261	2,0%
Total countries*	23.834	24.456	2,6%
Total countries**	23.709	24.336	2,6%

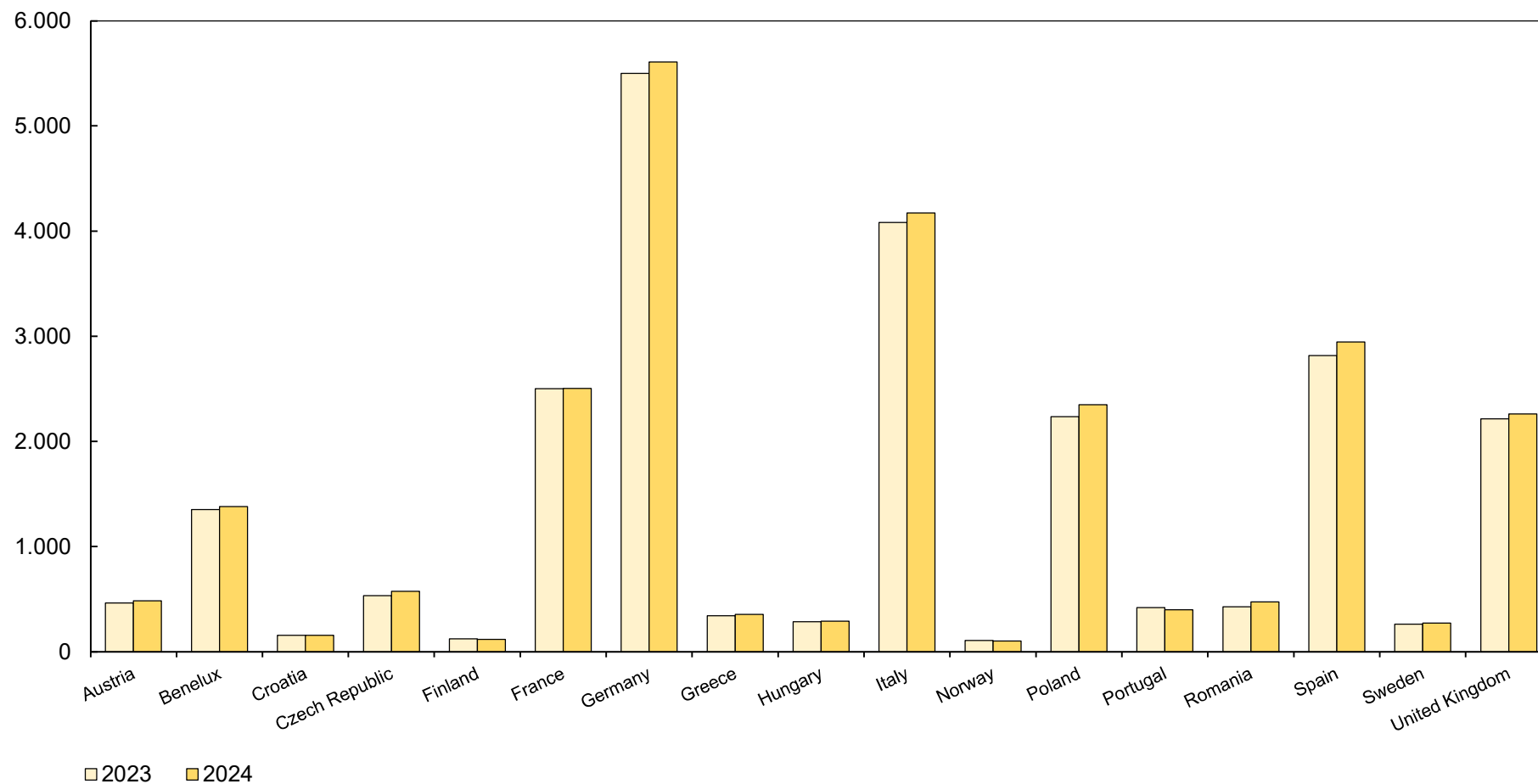
* including reported and estimated data for both years

** including reported data for both years

Finland 2023 : Shipment in m2 x 0,451 g/m2 (average weight in mail)

Finland 2024 : Shipment in m2 x 0,451 g/m2 (average weight in mail)

Production of Corrugated Board in '000 tonnes including non-members



Production of Corrugated Board

member companies vs. the whole country % of m²

	2023	2024
Austria	n.a.	n.a.
Benelux	74,0	74,5
Croatia	91	90
Czech Republic	69,7	70,0
Finland	75	75
Germany	71,3	70,1
Greece	80,0	80,0
Hungary	89	93,1
Italy	62,8	63,2
Norway	100,0	100,0
Poland	82,0	82,0
Portugal	90,0	90,0
Romania	100,0	100,0
Spain	76,5	77,1
Sweden	100,0	100,0
United Kingdom	88,1	88,1

* including countries that reported data for both years

Finland 2023 : estimated

Finland 2024 : estimated

Industry Structure

Number of Companies with Corrugators - members only

	2023	2024
Austria	5	4
Benelux	14	14
Croatia	3	3
Czech Republic	5	5
Finland	3	3
France	6	6
Germany	24	24
Greece	8	9
Hungary	4	4
Italy	28	30
Norway	3	3
Poland	22	23
Portugal	7	7
Romania	10	10
Spain	44	44
Sweden	4	4
United Kingdom	13	13
Total countries*	203	206
Total countries**	200	203

* including reported and estimated data for both years

** including reported data for both years

Finland 2024 : same as 2023

Industry Structure

Number of Plants with Corrugators - members only

	2023	2024
Austria	8	6
Benelux	20	20
Croatia	4	4
Czech Republic	7	7
Finland	3	3
France	58	58
Germany	86	86
Greece	11	11
Hungary	8	8
Italy	55	57
Norway	3	3
Poland	34	35
Portugal	12	12
Romania	13	13
Spain	60	61
Sweden	10	10
United Kingdom	50	50
Total countries*	442	444
Total countries**	439	441

* including reported and estimated data for both years

** including reported data for both years

Finland 2024 : same as 2023

Industry Structure

Number of Corrugators - members only

	≤2,1m		>2,1m - ≤2,5m		>2,5m - ≤2,8m		>2,8m		Total	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Austria	1	1	5	3	2	2	0	0	8	6
Benelux	1	1	14	14	3	3	3	3	21	21
Croatia	0	0	4	4	0	0	0	0	4	4
Czech Republic	0	0	1	1	4	4	0	0	5	5
Finland	3	3	0	0	0	0	0	0	3	3
Germany	4	4	56	56	23	23	1	1	84	84
Greece	1	1	8	8	2	2	0	0	11	11
Hungary	2	2	5	5	2	2	0	0	9	9
Italy	4	4	39	40	18	18	1	1	62	63
Norway	0	0	2	2	1	1	0	0	3	3
Poland	3	4	13	11	19	20	2	4	37	39
Portugal	0	0	9	9	3	3	0	0	12	12
Romania	0	0	0	0	13	13	0	0	13	13
Spain	3	3	51	51	11	11	0	1	65	66
Sweden	0	0	10	10	0	0	0	0	10	10
United Kingdom	10	10	37	37	8	8	2	2	57	57
Total countries*	32	33	254	251	109	110	9	12	404	406

* including countries that reported data for both years

Industry Structure

Number of Companies with Corrugators
including non-members

	2023	2024
Austria	6	6
Benelux	19	19
Croatia	5	5
Czech Republic	7	7
Finland	4	4
France	11	11
Germany	40	41
Greece	11	12
Hungary	6	6
Italy	53	55
Norway	3	3
Poland	n.a.	n.a.
Portugal	8	8
Romania	10	10
Spain	65	64
Sweden	4	4
United Kingdom	24	24
Total countries*	276	279
Total countries**	267	270

* including reported and estimated data for both years

** including reported data for both years

Croatia 2023 : Estimated

Croatia 2024 : Estimated

Finland 2023 : Estimated cfr 2022

Finland 2024 : Estimated cfr 2022

Industry Structure

Number of Plants with Corrugators - including non-members

	2023	2024
Austria	9	9
Benelux	26	26
Croatia	6	6
Czech Republic	9	9
Finland	4	4
France	72	72
Germany	121	120
Greece	14	14
Hungary	10	10
Italy	85	87
Norway	3	3
Poland	n.a.	n.a.
Portugal	13	13
Romania	13	13
Spain	86	86
Sweden	10	10
United Kingdom	61	61
Total countries*	542	543
Total countries**	536	537

* including reported and estimated data for both years

** including reported data for both years

Croatia 2023 : Estimated

Croatia 2024 : Estimated

Industry Structure

Number of Corrugators - including non-members

	≤2,1m		>2,1m - ≤2,5m		>2,5m - ≤2,8m		>2,8m		Total	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Austria	1	1	6	6	2	2	0	0	9	9
Benelux	1	1	19	19	6	6	3	3	29	29
Croatia	0	0	6	6	0	0	0	0	6	6
Czech Republic	1	1	4	4	4	4	1	1	10	10
Finland	4	4	0	0	0	0	0	0	4	4
Germany	5	6	66	64	30	33	3	4	104	107
Greece	1	1	11	11	2	2	0	0	14	14
Hungary	3	3	5	5	3	3	0	0	11	11
Italy	8	7	60	62	26	25	1	1	95	95
Norway	0	0	2	2	1	1	0	0	3	3
Portugal	0	0	10	10	3	3	0	0	13	13
Romania	0	0	0	0	13	13	0	0	13	13
Spain	8	9	72	70	11	11	0	1	91	91
Sweden	0	0	10	10	0	0	0	0	10	10
United Kingdom	18	18	40	40	8	8	3	3	69	69
Total countries*	50	51	311	309	109	111	11	13	481	484

* including countries that reported data for both years

Average weight of board in g/m²

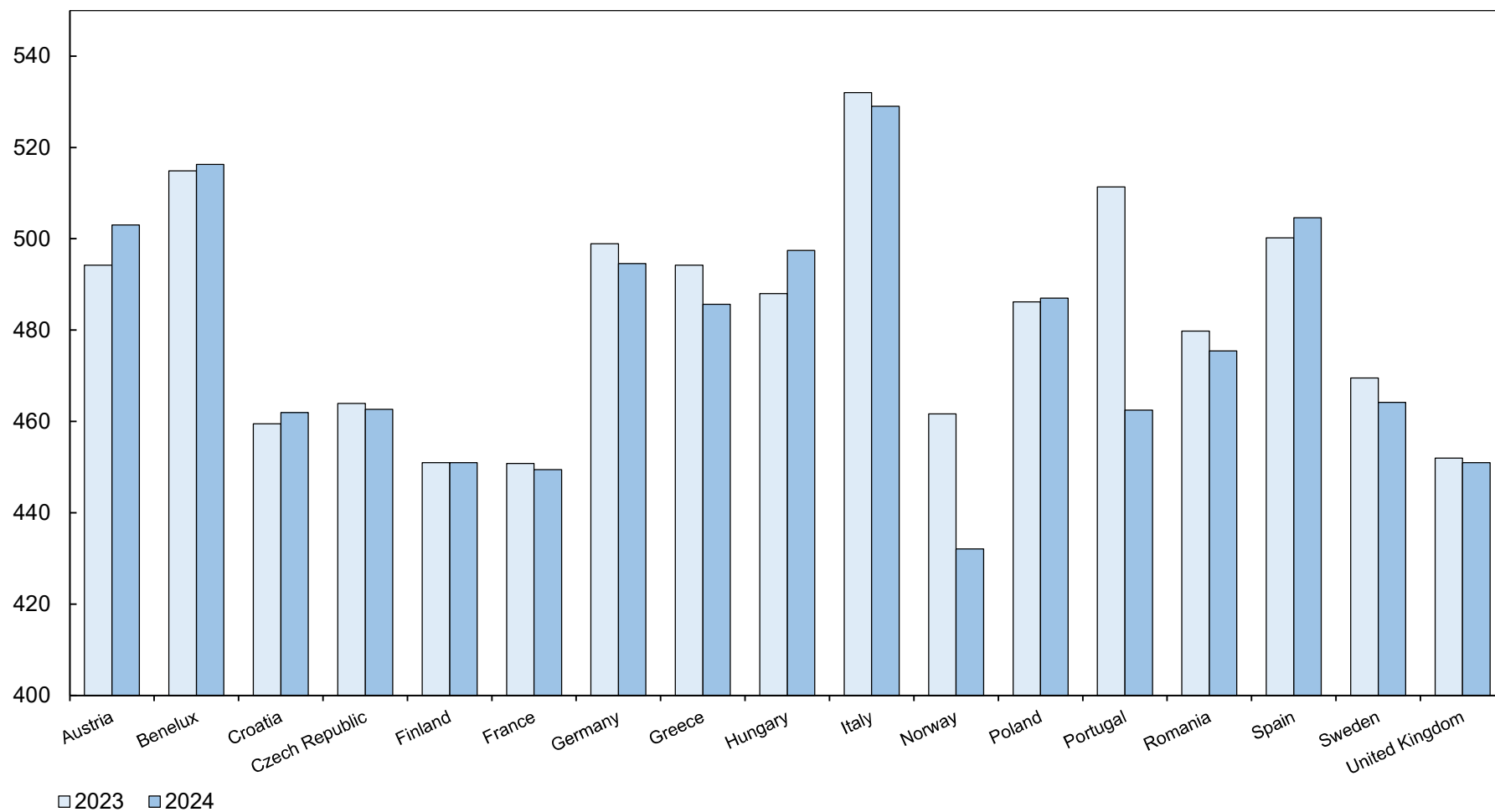
including non-members

	2023	2024
Austria	494	503
Benelux	515	516
Croatia	460	462
Czech Republic	464	463
Finland	451	451
France	451	449
Germany	499	495
Greece	494	486
Hungary	488	497
Italy	532	529
Norway	462	432
Poland	486	487
Portugal	511	462
Romania	480	475
Spain	500	505
Sweden	470	464
United Kingdom	452	451
Total countries * weighted average	491	489
Total countries ** weighted average	498	497

* including reported and estimated data for both years

** including reported data for both years

Average weight of board in g/m²
incl. non-members



Products as % of total Production in m²
members only

	Die-cut products		Regular slotted corrugated cases products		Corrugated board in sheet form		All other products		Total 2023	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Benelux	35,8	36,8	53,5	52,1	9,7	10,3	1,0	1,0	100%	100%
Croatia	44,1	47,1	28,0	28,1	26,1	22,1	2,2	3,0	100%	100%
Czech Republic	39,8	40,3	43,0	42,0	12,3	12,3	4,8	5,4	100%	100%
Finland	60,4	60	34,0	34	6,0	6	0,0	0	100%	100%
Germany	50,8	50,4	38,8	40,0	7,5	7,0	2,8	2,6	100%	100%
Greece	31,4	33,1	48,5	50,2	10,5	9,8	9,5	7,0	100%	100%
Hungary	47,6	34,3	29,8	38,5	3,3	4,2	19,3	23,1	100%	100%
Norway	64,1	64,8	29,3	29,3	2,8	2,7	3,9	3,3	100%	100%
Poland	42,3	42,5	26,6	27,0	28,0	27,1	3,2	3,4	100%	100%
Portugal	0	0	63	63	32	30	5	7	100%	100%
Romania	39,5	39,9	32,6	33,0	25,0	24,5	3,0	3,0	100%	100%
Spain	56	54,0	36	35,0	5	5,7	3	5,3	100%	100%
United Kingdom	36,7	36,3	30,6	30,1	32,7	33,2	0,0	0,0	100%	100%
Total countries* as weighted average	44,48%	43,88%	36,51%	36,72%	16,09%	16,02%	2,91%	3,34%	100%	100%

* including countries that reported data for both years

Exports of Corrugated Products

in millions of m² - members only

	2023	2024	% Change 2024 vs 2023
Benelux	566	578	2,1%
Croatia	155	148	-4,8%
Czech Republic	186	207	11,1%
Finland	4	4	0,0%
Greece	10	12	25,0%
Hungary	194	125	-35,6%
Italy	130	135	3,5%
Norway	10	12	15,9%
Poland	891	950	6,6%
Portugal	27	29	7,8%
Romania	30	34	12,5%
Spain	144	144	-0,2%
Total countries*	2.348	2.377	1,2%
Total countries**	2.344	2.373	1,2%

* including reported and estimated data for both years

** including reported data for both years

Finland 2024 : Same as 2023

Exports of Corrugated Products

in '000 tonnes - members only

	2023	2024	% Change 2024 vs 2023
Austria	145	147	1,8%
Benelux	576	565	-1,9%
Croatia	67	65	-3,1%
Czech Republic	85	94	10,3%
Finland	2	2	0,0%
Greece	12	15	25,1%
Hungary	61	59	-3,3%
Italy	71	74	3,4%
Norway	4	5	18,4%
Poland	443	450	1,5%
Romania	63	67	6,0%
Spain	72	73	0,9%
Total countries*	1.602	1.616	0,8%
Total countries**	1.600	1.614	0,8%

* including reported and estimated data for both years

** including reported data for both years

Finland 2024 : Same as 2023

Exports of Corrugated Products

in millions of m² - including non-members

	2023	2024	% Change 2024 vs 2023
Benelux	764	776	1,6%
Czech Republic	306	340	11,1%
Finland	6	6	0,0%
Germany	2.326	2.328	0,1%
Greece	10	12	25,3%
Hungary	213	144	-32,4%
Italy	207	213	2,8%
Norway	10	12	15,9%
Romania	30	34	12,5%
Spain	187	187	-0,4%
Total countries*	4.059	4.051	-0,2%
Total countries**	4.054	4.045	-0,2%

* including reported and estimated data for both years

** including reported data for both years

Finland 2023 : Estimation based on nbre of company members - nbre of companies non members included

Finland 2024 : Estimation based on nbre of company members - nbre of companies non members included

Exports of Corrugated Products

in '000 tonnes - including non-members

	2023	2024	% Change 2024 vs 2023
Austria	248	243	-1,9%
Benelux	778	767	-1,4%
Czech Republic	143	158	10,5%
Finland	3	3	0,0%
Germany	1.166	1.160	-0,5%
Greece	12	15	24,8%
Hungary	67	65	-3,1%
Italy	110	113	2,3%
Norway	4	5	18,4%
Poland	456	471	3,4%
Romania	63	67	6,0%
Spain	94	94	0,7%
United Kingdom	27	31	14,4%
Total countries*	3.170	3.192	0,7%
Total countries**	3.167	3.189	0,7%

* including reported and estimated data for both years

** including reported data for both years

Turnover

in '000 of Euros - members only

	2023	2024	% Change 2024 vs 2023
Austria	542.335	500.986	-7,6%
Benelux	1.399.199	1.270.570	-9,2%
Croatia	149.417	139.326	-6,8%
Czech Republic	472.622	455.993	-3,5%
Finland	217.327	217.327	0,0%
Germany	5.164.382	4.732.117	-8,4%
Greece	331.853	323.932	-2,4%
Hungary	359.606	324.191	-9,8%
Italy	2.802.000	2.724.000	-2,8%
Norway	243.930	243.930	0,0%
Poland	2.617.800	2.638.600	0,8%
Romania	489.177	485.440	-0,8%
Spain	2.946.909	2.949.910	0,1%
Total countries*	17.736.557	17.006.322	-4,1%
Total countries**	17.275.300	16.545.065	-4,2%

* including reported and estimated data for both years

** including reported data for both years

Turnover

in '000 of Euros - including non-members

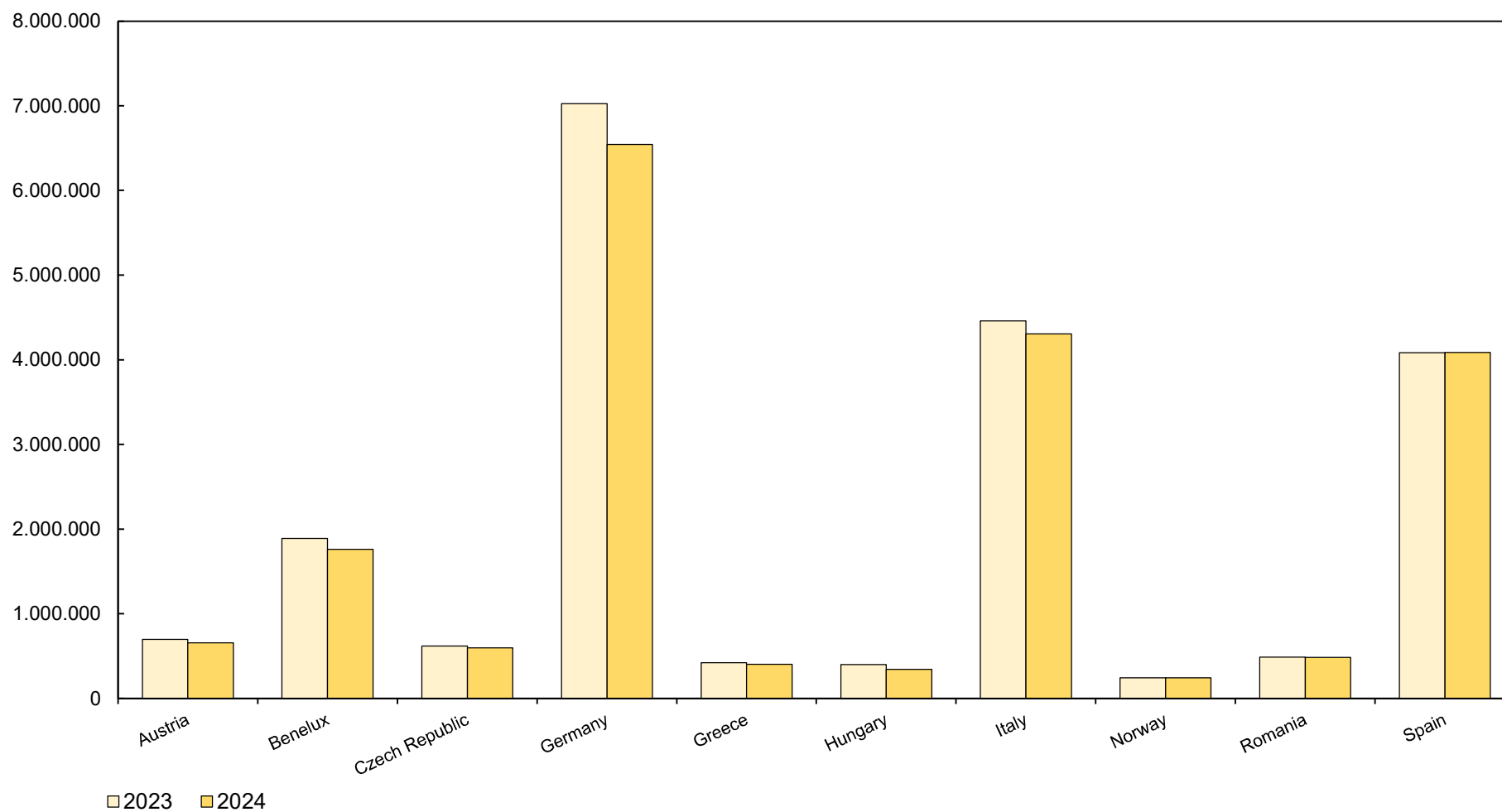
	2023	2024	% Change 2024 vs 2023
Austria	698.731	655.832	-6,1%
Benelux	1.889.564	1.760.935	-6,8%
Czech Republic	620.245	598.422	-3,5%
Germany	7.025.157	6.544.397	-6,8%
Greece	424.853	404.932	-4,7%
Hungary	403.090	346.885	-13,9%
Italy	4.459.000	4.305.000	-3,5%
Norway	243.930	243.930	0,0%
Romania	489.177	485.440	-0,8%
Spain	4.083.000	4.087.000	0,1%
Total countries*	20.336.747	19.432.773	-4,4%
Total countries**	20.092.817	19.188.843	-4,5%

* including reported and estimated data for both years

** including reported data for both years

Norway 2024 : Same as MC only 2023

Turnover in '000 of Euros
including non-members



Raw Materials

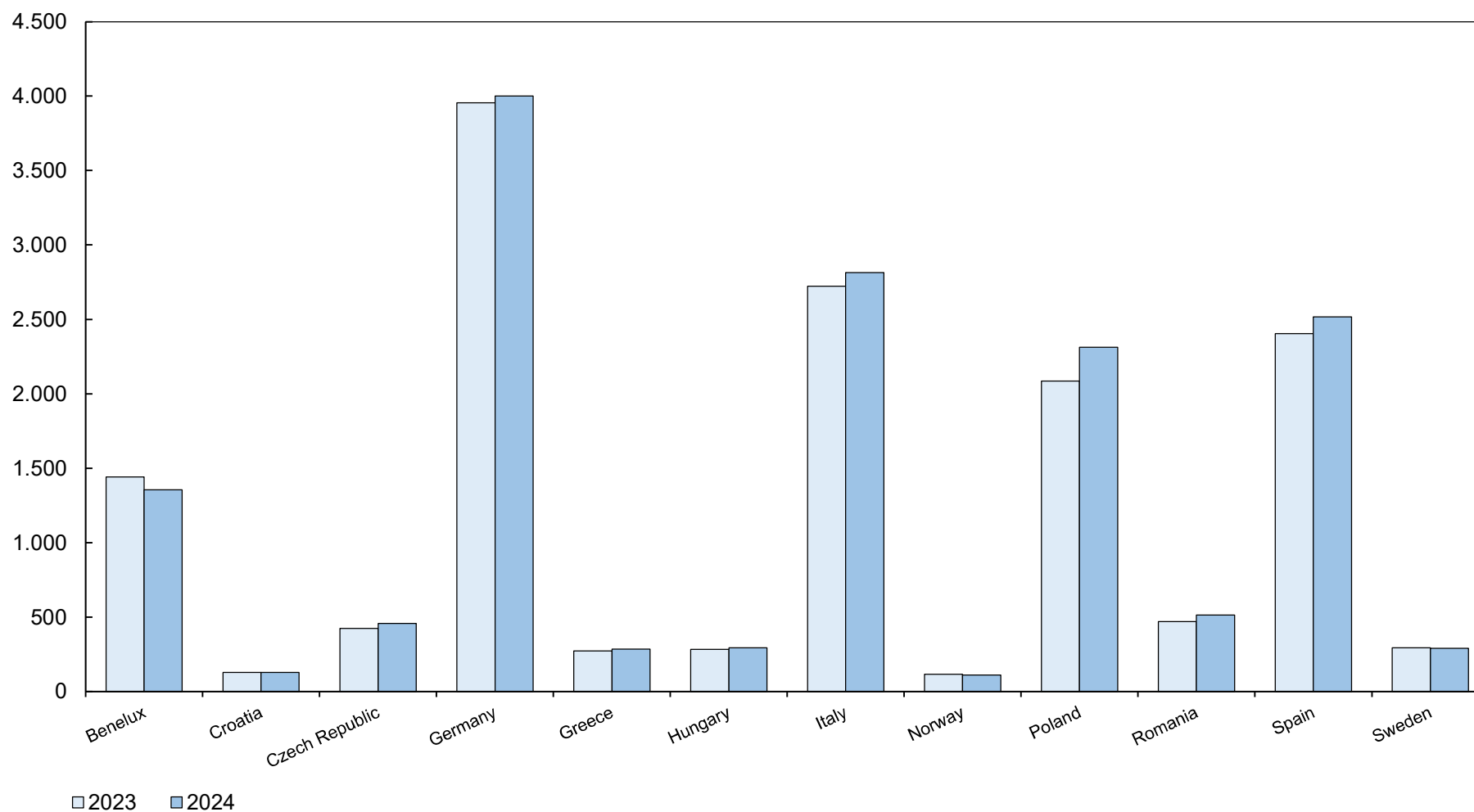
Total Consumption in '000 tonnes - members only

	2023	2024	% Change 2024 vs 2023
Benelux	1.441,0	1.355,0	-6,0%
Croatia	127,8	127,9	0,1%
Czech Republic	424,6	458,0	7,9%
Germany	3.955,3	4.001,2	1,2%
Greece	273,7	285,5	4,3%
Hungary	285,0	294,0	3,2%
Italy	2.723,0	2.814,2	3,3%
Norway	116,4	111,1	-4,6%
Poland	2.086,2	2.313,1	10,9%
Romania	469,3	514,0	9,5%
Spain	2.403,4	2.517,3	4,7%
Sweden	293,2	291,1	-0,7%
Total countries*	14.598,9	15.082,4	3,3%
Total countries**	14.598,9	15.082,4	3,3%

* including reported and estimated data for both years

** including reported data for both years

Raw Materials : Total Consumption in '000 tonnes members only



as % of the Total Consumption in total weight - members only

	Brown Kraftliner		White or Colored Kraftliner		Testliners		White Top Testliner		Other Liners		Fluting		Semi-Chemical Fluting	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Austria	15,6	15,9	6,1	5,1	27,1	27,1	9,3	8,7	4,0	4,3	31,9	34,2	6,0	4,7
Benelux	14,7	14,4	5,3	5,6	44,2	47,8	9,1	9,9	5,8	1,6	19,4	19,9	1,5	0,9
Croatia	5,3	5,2	1,2	0,9	30,2	30,1	18,1	18,3	3,4	3,2	41,1	41,6	1,0	1,1
Czech Republic	12,0	12,4	2,8	2,9	34,3	40,7	7,5	7,3	6,5	1,6	36,6	34,6	0,4	0,6
Finland	30,4	0	12,1	0	26,3	0	0,0	0	0,0	0	10,7	0	20,5	0
Germany	13,4	13,2	4,7	4,6	34,1	35,3	8,2	7,8	0,8	0,7	38,1	38,0	0,7	0,5
Greece	12,0	11,7	2,8	2,8	33,3	33,6	4,9	5,0	0,7	0,7	37,6	37,2	8,8	8,8
Hungary	13,9	11,4	1,9	3,8	31,7	32,7	7,9	10,9	3,0	2,0	40,2	37,7	1,4	1,5
Italy	14,6	14,5	7,5	7,4	23,2	23,6	5,0	5,2	0,0	0,0	43,5	43,6	6,2	5,7
Norway	15,0	15,3	29,4	30,6	22,6	26,0	0,7	0,7	0,4	0,5	16,1	11,5	15,7	15,4
Poland	7,9	8,3	1,4	1,6	37,4	38,1	12,2	11,7	2,3	1,7	38,2	37,9	0,6	0,6
Portugal	15	16	2	2	39,4	41,7	0	0	4	1	21	21	19	18
Romania	13,2	14,0	1,2	3,4	27,4	27,0	10,9	7,0	4,3	7,3	42,5	40,0	0,5	1,2
Spain	11,4	11,0	3,9	3,9	38,6	39,9	3,5	3,8	4,7	4,8	33,9	32,3	4,1	4,3
Sweden	28,0	27,0	8,0	9,0	26,0	29,0	0,0	0,0	0,0	0,0	29,0	27,0	9,0	8,0
Total countries as weighted average	13,0%	12,6%	4,6%	4,6%	33,5%	34,5%	7,2%	7,1%	2,3%	1,8%	36,1%	35,6%	3,4%	3,0%

Raw Materials

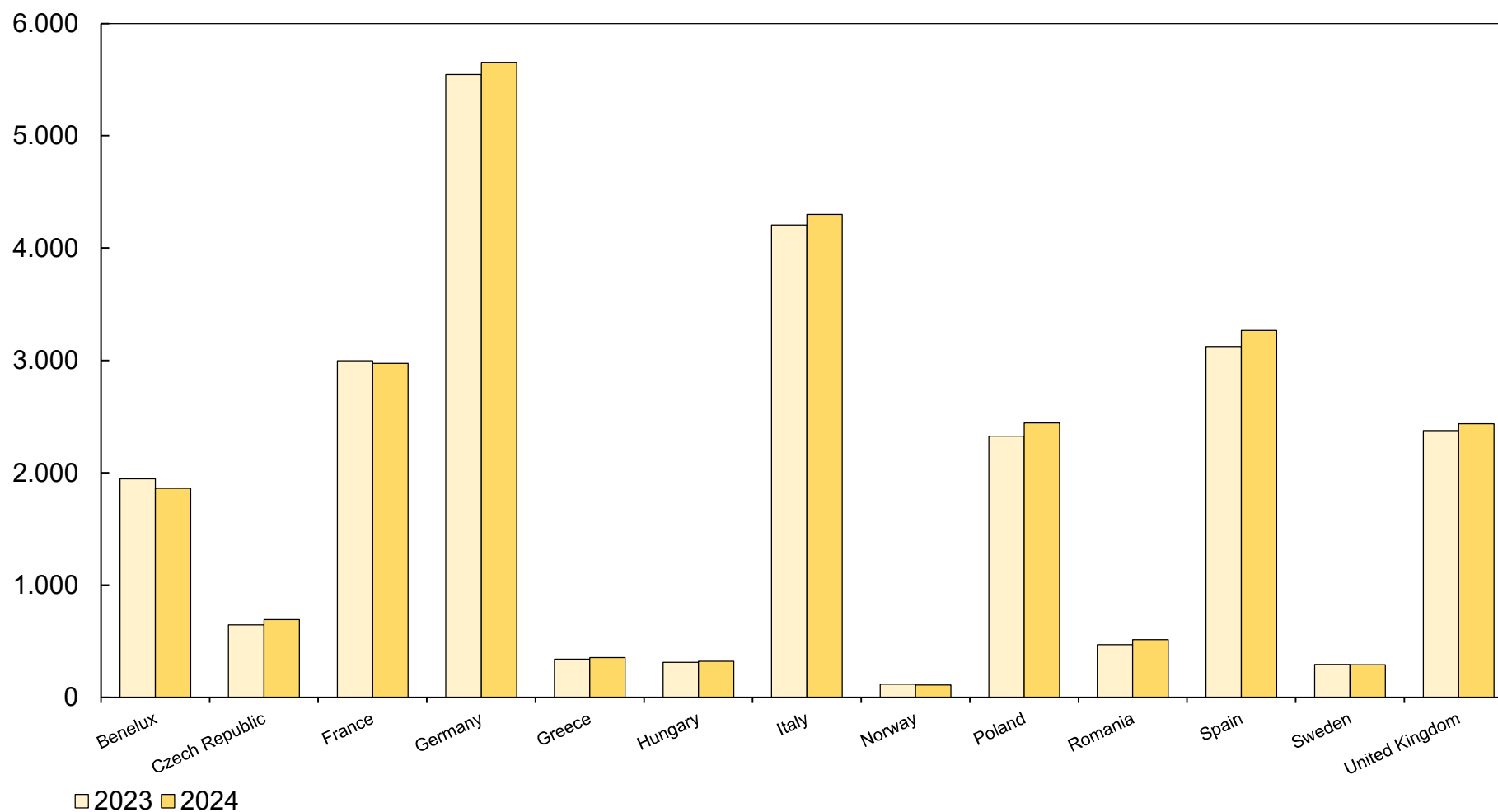
Total Consumption in '000 tonnes - including non-members

	2023	2024	% Change 2024 vs 2023
Benelux	1.946	1.860	-4,4%
Czech Republic	646	692	7,0%
France	2.998	2.974	-0,8%
Germany	5.547	5.655	1,9%
Greece	342	357	4,3%
Hungary	313	323	3,2%
Italy	4.205	4.298	2,2%
Norway	116	111	-4,6%
Poland	2.326	2.443	5,0%
Romania	469	514	9,5%
Spain	3.123	3.266	4,6%
Sweden	293	291	-0,7%
United Kingdom	2.375	2.436	2,6%
Total countries*	24.701	25.220	2,1%
Total countries**	24.701	25.220	2,1%

* including reported and estimated data for both years

** including reported data for both years

Raw Materials : Total Consumption in '000 tonnes including non-members



Production information

Products made in each of the fluting-types in % of m² - members only

	B-Flute		C-Flute		BC-Flute		E-Flute		Micro-Flute		Other Fluting-Types	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Austria	33,1	32,5	15,4	15,6	10,8	11,6	23,7	24,7	0,7	0,7	16,3	14,9
Benelux	47,2	44,0	14,9	14,4	8,5	7,8	6,3	6,5	1,5	1,4	21,6	25,8
Croatia	44,2	45,2	15,4	15,0	11,3	10,5	16,5	15,5	2,2	2,4	10,8	11,4
Czech Republic	47,2	47,9	10,4	10,0	12,0	12,0	15,9	15,8	0,0	0,0	14,5	14,4
Germany	33,7	33,4	10,9	10,8	15,1	15,1	15,0	14,8	1,0	0,9	24,2	25,0
Greece	27,1	28,1	37,1	36,1	21,0	20,4	8,2	8,3	0,2	0,1	6,4	7,0
Hungary	38,2	40,0	13,6	13,0	14,7	13,2	16,8	17,4	7,1	7,5	9,4	8,9
Norway	50,6	51,5	28,1	27,3	6,1	5,7	13,5	14,0	0,4	0,2	1,3	1,2
Poland	42,1	41,5	13,1	14,2	12,5	10,7	15,0	13,9	0,5	3,2	16,8	16,6
Portugal	31	30	14	15	22	23	11	8	4	4	18	21
Romania	40,6	37,4	17,1	19,1	20,5	15,6	12,8	14,7	3,5	3,0	5,5	9,8
Spain	22,0	23,0	25,7	25,6	18,6	19,8	15,0	14,1	2,7	3,0	16,0	14,5
Sweden	35,0	37,0	44,0	41,0	0,0	0,0	0,0	0,0	0,0	0,0	21,0	22,0
Total countries as weighted average	35,1%	34,8%	16,5%	16,6%	14,6%	14,2%	13,9%	13,5%	1,5%	2,0%	18,5%	18,9%

Production information

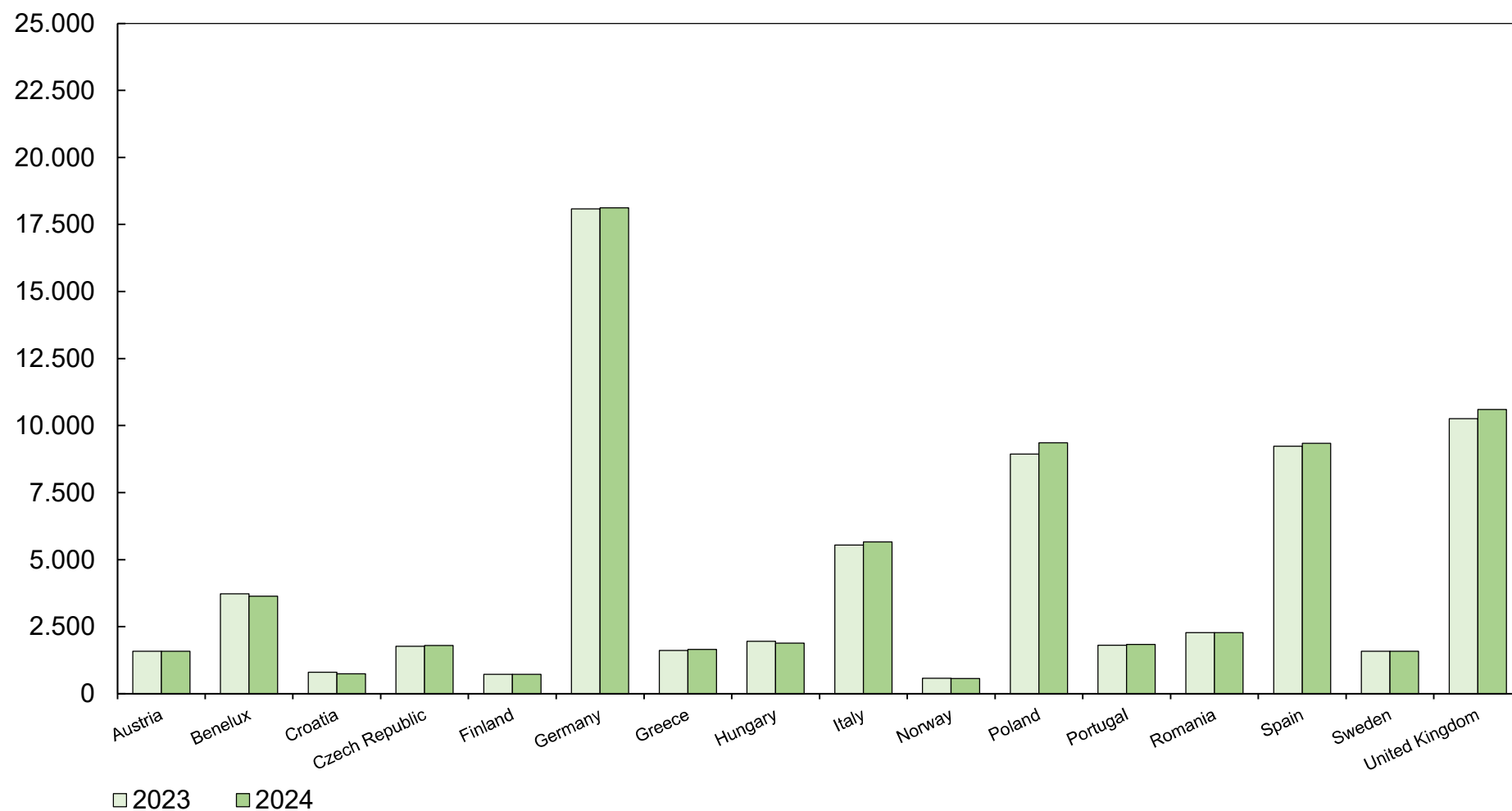
Percentage of Production by Number of Flexo Printed Colours members only

	0		1		2		3		>3	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Austria	31,1	28,3	40,9	39,6	8,8	11,4	8,4	9,6	10,8	11,1
Benelux	36,7	42,2	36,5	33,1	14,8	14,2	6,6	5,9	5,5	4,7
Croatia	57,8	57,7	24,6	25,4	7,4	7,6	6,2	5,8	4,1	3,5
Czech Republic	33,6	32,9	45,8	46,0	11,3	11,0	5,2	5,6	4,0	4,4
Germany	28,0	26,5	37,4	38,6	15,8	16,9	10,8	11,1	7,9	6,9
Greece	32,3	26,4	32,4	35,3	19,6	21,0	10,1	11,1	5,6	6,1
Hungary	46,0	42,2	27,2	29,7	12,3	11,5	6,4	6,7	8,1	9,8
Norway	51,6	50,9	25,2	26,7	12,1	10,7	7,2	7,7	3,9	4,0
Poland	52,4	43,4	22,4	27,8	10,9	12,7	6,0	7,8	8,3	8,3
Romania	39,5	31,6	38,4	42,4	11,7	14,4	4,9	5,8	5,5	6,0
Spain	17,5	15,8	43,4	41,0	16,9	18,6	11,7	13,5	10,5	11,2
Total countries as weighted average	33,3%	30,7%	35,4%	36,3%	14,3%	15,5%	9,0%	9,8%	8,0%	7,8%

	Production Employees		Number of rest of Employees		Total Employees	
	2023	2024	2023	2024	2023	2024
Austria	1.099	1.099	489	484	1.588	1.583
Benelux	2.536	2.580	1.186	1.056	3.722	3.636
Croatia	653	591	147	152	800	743
Czech Republic	1.438	1.453	334	344	1.772	1.797
Finland	527	527	195	195	722	722
Germany	12.929	12.897	5.154	5.217	18.083	18.114
Greece	1.011	1.096	599	555	1.610	1.651
Hungary	1.355	1.288	604	604	1.959	1.892
Italy	4.432	4.532	1.108	1.133	5.540	5.665
Norway	377	364	197	199	574	563
Poland	6.139	6.425	2.798	2.934	8.937	9.359
Portugal	1.372	1.374	437	460	1.809	1.834
Romania	1.688	1.688	593	593	2.281	2.281
Spain	7.054	7.147	2.175	2.194	9.229	9.341
Sweden	1.078	1.077	510	508	1.588	1.585
United Kingdom	6.841	7.069	3.416	3.529	10.257	10.598
Total countries*	50.529	51.207	19.942	20.157	70.471	71.364

* including countries that reported data for both years

Total Number of Employees members only



Organisational Information

Nominal Number of working days per calendar year - members only

	2023	2024	% Change 2024 vs 2023
Austria	223	225	0,9%
Benelux	238	236	-0,8%
Croatia	250	251	0,4%
Czech Republic	250	252	0,8%
Finland	238	238	0,0%
France	251	252	0,4%
Germany	250	250	0,0%
Greece	256	256	0,0%
Hungary	231	231	0,0%
Italy	250	254	1,6%
Norway	230	230	0,0%
Poland	250	251	0,4%
Portugal	243	247	1,6%
Romania	248	252	1,6%
Spain	221	221	0,0%
Sweden	226	226	0,0%
United Kingdom	248	251	1,2%
Average	242	243	0,5%

Finland 2024 : Estimated

Organisational Information

Nominal Number of working hours per employee/calendar year - members only

	2023	2024	% Change 2024 vs 2023
Austria	1.694	1.692	-0,1%
Benelux	1.904	1.892	-0,6%
Croatia	2.000	2.008	0,4%
Czech Republic	2.000	2.016	0,8%
Finland	1.850	1.850	0,0%
Germany	1.514	1.523	0,6%
Greece	2.048	2.076	1,4%
Hungary	1.848	1.848	0,0%
Italy	2.000	2.032	1,6%
Norway	1.725	1.725	0,0%
Poland	2.000	2.008	0,4%
Portugal	1.768	1.857	5,0%
Romania	1.984	2.016	1,6%
Spain	1.768	1.768	0,0%
Sweden	1.492	1.492	0,0%
United Kingdom	1.710	1.710	0,0%
Average	1.830	1.844	0,8%

Finland 2024 : estimated

Classification of Production by End User in % of m² (I) - members only

		Austria		Benelux		Croatia		Czech Republic		France		Finland		Germany		Greece		Hungary		Italy	
		2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
1	Fresh Produce	0,0	20,0	16,9	18,0	6,7	4,5	1,3	1,2	12,4	0,0	0,0	0,0	2,6	2,5	11,4	12,8	3,7	4,1	9,8	9,2
2	Meat & fish	0,0	2,0	2,6	2,7	8,7	9,1	1,3	1,1	3,4	0,0	0,0	0,0	2,6	3,1	5,5	7,5	2,8	1,9	4,0	4,2
3	Dairy products	0,0	1,0	4,7	5,0	21,6	21,4	11,7	12,6	8,3	0,0	0,0	0,0	8,1	8,3	6,0	5,5	3,4	4,2	5,2	5,4
4	Processed food	0,0	7,0	24,0	29,0	15,6	16,1	13,6	13,7	24,8	0,0	0,0	0,0	29,2	28,4	21,1	19,3	18,8	19,9	31,0	31,5
5	Beverages	0,0	15,0	5,9	7,4	6,9	7,2	5,4	5,5	11,4	0,0	0,0	0,0	6,7	6,9	9,1	7,0	4,8	4,9	12,6	12,4
6	FMCG= Fast Moving Consumer Goods	0,0	9,0	9,4	11,2	9,4	9,2	15,8	16,1	4,3	0,0	0,0	0,0	10,1	10,3	12,2	12,5	14,8	14,4	10,2	9,8
7	Long lasting goods	0,0	14,0	2,0	1,9	3,8	3,6	10,3	10,2	0,0	0,0	0,0	0,0	6,0	5,5	1,2	1,0	7,5	7,7	3,6	3,5
8	IT, Communication & Audio	0,0	2,0	0,2	0,1	0,4	0,5	2,9	2,9	0,0	0,0	0,0	0,0	1,9	1,8	0,3	0,4	11,5	12,2	2,4	2,5
9	Capital goods	0,0	3,0	3,2	1,4	1,0	1,2	5,7	4,8	2,5	0,0	0,0	0,0	3,2	3,3	2,5	4,8	9,3	9,7	2,5	2,3
10	Auxiliary goods	0,0	4,0	4,2	5,7	3,8	4,5	2,5	3,3	6,6	0,0	0,0	0,0	8,5	8,6	5,1	4,0	3,5	1,6	3,0	3,1
11	Logistics	0,0	1,0	3,1	4,3	8,1	7,7	0,7	0,7	3,9	0,0	0,0	0,0	1,6	1,7	0,9	4,4	0,4	0,3	1,8	2,0
12	Packaging for ecommerce	0,0	2,0	1,2	1,4	4,4	4,6	14,6	14,7	0,0	0,0	0,0	0,0	7,5	8,0	1,3	6,4	2,5	2,0	8,8	9,2
13	Paper products	0,0	5,0	10,5	4,8	2,4	2,3	8,2	7,5	15,9	0,0	0,0	0,0	4,4	4,1	10,2	10,1	10,5	10,0	4,1	3,6
14	Others products excluding sheets	0,0	15,0	12,1	7,2	7,2	8,1	6,0	5,7	6,5	0,0	0,0	0,0	7,6	7,6	13,3	4,4	6,5	7,1	1,0	1,3
15	Total	0%	100%	100%	100%	100%	100%	100%	100%	100%	0%	0%	0%	100%	100%	100%	100%	100%	100%	100%	100%

Classification of Production by End User in % of m² (II) - members only

		Norway		Poland		Portugal		Romania		Spain		Sweden		United Kingdom		weighted Average	
		2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
1	Fresh Produce	14,0	0,0	9,2	7,1	7,3	7,7	3,0	3,0	15,4	15,2	0,0	0,0	0,0	0,0	8,4	8,2
2	Meat & fish	14,7	0,0	5,1	5,7	0,0	0,0	1,2	1,2	10,2	10,1	0,0	0,0	0,0	0,0	4,5	4,7
3	Dairy products	9,2	0,0	7,4	7,6	0,0	0,0	3,1	3,1	5,6	6,3	0,0	0,0	0,0	0,0	6,6	6,7
4	Processed food	15,2	0,0	16,8	16,1	15,2	14,9	9,1	9,1	18,2	21,0	0,0	0,0	0,0	0,0	23,3	23,4
5	Beverages	5,1	0,0	5,6	5,4	12,0	11,7	4,2	4,2	9,7	9,1	0,0	0,0	0,0	0,0	8,1	8,1
6	FMCG= Fast Moving Consumer Goods	4,6	0,0	10,8	12,1	7,2	6,4	16,3	16,3	10,8	8,1	0,0	0,0	0,0	0,0	10,6	10,6
7	Long lasting goods	3,8	0,0	9,9	9,7	13,4	13,2	23,5	23,5	2,5	3,7	0,0	0,0	0,0	0,0	6,1	6,4
8	IT, Communication & Audio	1,1	0,0	3,6	3,2	1,4	1,6	1,0	1,0	0,7	0,5	0,0	0,0	0,0	0,0	2,0	2,0
9	Capital goods	0,0	0,0	1,0	2,0	1,6	2,1	4,2	4,2	2,2	1,9	0,0	0,0	0,0	0,0	2,7	2,7
10	Auxiliary goods	0,0	0,0	1,3	0,9	1,0	1,2	2,0	2,0	3,8	4,9	0,0	0,0	0,0	0,0	4,5	4,7
11	Logistics	11,2	0,0	0,7	0,9	2,6	2,3	0,3	0,3	5,4	5,0	0,0	0,0	0,0	0,0	2,3	2,3
12	Packaging for ecommerce	0,0	0,0	7,9	8,4	6,0	4,7	2,2	2,2	5,9	5,0	0,0	0,0	0,0	0,0	6,7	6,9
13	Paper products	1,7	0,0	9,1	8,5	21,3	22,4	12,8	12,8	2,8	3,1	0,0	0,0	0,0	0,0	6,4	5,7
14	Others products excluding sheets	19,2	0,0	11,8	12,7	11,0	11,8	17,3	17,3	6,8	6,1	0,0	0,0	0,0	0,0	7,8	7,6
15	Total	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	0%	0%	0%	0%	100%	100%

Production per production head

in thousand of m² - members only

	2023	2024	% Change 2024 vs 2023
Austria	660	651	-1,3%
Benelux	767	772	0,7%
Croatia	499	547	9,5%
Czech Republic	561	599	6,8%
Finland	455	438	-3,7%
Germany	608	616	1,3%
Greece	549	534	-2,7%
Hungary	385	423	10,0%
Italy	1.088	1.101	1,2%
Norway	615	650	5,6%
Poland	688	719	4,5%
Portugal	545	570	4,6%
Romania	527	592	12,2%
Spain	615	629	2,3%
Sweden	518	544	5,1%
United Kingdom	631	625	-1,1%
Total countries*	655	671	2,3%
Total countries**	651	666	2,4%

* including reported and estimated data for both years

** including reported data for both years



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