

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)	48.629	49.442	1,7
Total Shipments ('000 Tonnes) (including Non-Members)	25.061	25.463	1,6
Shipments of Member Companies (Millions of m ²)	39.039	38.870	-0,4
Shipments of Member Companies ('000 Tonnes)	19.921	19.710	-1,1
Total Number of Companies (including Non-Members)	368	367	-0,3
Total Number of Plants (including Non-Members)	631	637	0,9
Average Weight of Board in g/m ² (including Non-Members)	515	515	-0,1
Total Consumption of Raw Materials ('000 Tonnes) (including Non-Members)	19.354	19.585	1,2
Consumption of White or Colored Kraftliner as % of total consumption of Raw Materials	5,2	6,4	18,8
Consumption of Brown Kraftliner as % of total consumption of Raw Materials	14,7	13,1	-12,2
Consumption of White Top Testliner as % of total consumption of Raw Materials	7,7	6,0	-28,3
Consumption of Testliner as % of total consumption of Raw Materials	28,0	31,5	11,1
Consumption of Other Recycled Liner as % of total consumption of Raw Materials	4,3	3,6	-19,4
Consumption of Semi-chemical Fluting as % of total consumption of Raw Materials	4,1	3,5	-17,1
Consumption of Recycled Fluting as % of total consumption of Raw Materials	37,8	37,3	-1,3
Total Personnel	83.864	85.520	1,9
Shipments to CONVERTERS	311,0	316,0	1,6
Shipments to TRADERS	62,0	82,0	24,4

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
Norway	218	219	0,46	Y / Y
Poland	4.230	4.480	5,91	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	5.140	1,68	N / N
TOTAL EUROPE	48.629	49.442	1,70	

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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
Norway	102	99	-2,94
Poland	2.067	2.173	5,13
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	2.344	1,69
TOTAL EUROPE	25.061	25.463	1,60

B4

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
Norway	218	219	0,46
Poland	3.649	3.792	3,92
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	4.170	0,85
Membership Total	39.039	38.870	-0,40

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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
Norway	102	100,00	99	100,00
Poland	1.770	85,63	1.830	84,22
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	1.902	81,14
Membership Total	19.921	80,50	19.710	78,30

B6

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
Norway	3	3
Poland	40	42
Romania	11	11
Spain	72	71
Sweden	4	4
Turkey	88	89
United Kingdom	27	27
TOTAL EUROPE	368	372

B7

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
Norway	3	3
Poland	55	57
Romania	12	12
Spain	90	89
Sweden	10	10
Turkey	110	114
United Kingdom	68	68
TOTAL EUROPE	631	642

B8

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
Norway	n.a.	2	1	3
Poland	n.a.	n.a.	n.a.	n.a.
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	314	82	450

B9

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
Norway	468	452
Poland	489	485
Romania	491	488
Spain	524	528
Sweden	490	475
Turkey	521	530
United Kingdom	456	456
TOTAL EUROPE as weighted average	515	515

B10

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.
Norway	58,6	60,5
Poland	40,2	40,8
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	44,8	44,7

B11

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
Norway	111	108	-2,70
Poland	2.150	2.260	5,12
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	2.481	-1,86

*includes members only

TOTAL EUROPE	19.354	19.585	1,20
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B12

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
Norway	20,6	21,0
Poland	1,6	2,0
Romania	1,0	2,0
Spain	4,6	6,6
Sweden	1,0	3,0
Turkey	1,6	1,6
United Kingdom	4,0	10,7
TOTAL EUROPE as weighted average	5,2	6,4

B13

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
Norway	13,4	12,1
Poland	8,3	8,8
Romania	10,0	12,0
Spain	14,4	13,4
Sweden	28,0	31,0
Turkey	17,0	14,9
United Kingdom	15,2	7,3
TOTAL EUROPE as weighted average	14,7	13,1

B14

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
Norway	11,2	11,5
Poland	11,8	12,3
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	7,7	6,0

B15

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
Norway	18,7	19,2
Poland	36,3	37,1
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	28,0	31,5

B16

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
Norway	n.a.	n.a.
Poland	2,1	1,9
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	4,3	3,6
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B17

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
Norway	15,1	15,7
Poland	0,8	0,7
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	4,1	3,5

B18

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
Norway	21,0	20,5
Poland	39,1	37,2
Romania	35,0	35,0
Spain	39,8	36,5
Sweden	25,0	26,0
Turkey	43,0	42,8
United Kingdom	41,7	42,5
TOTAL EUROPE as weighted average	37,8	37,3

B19

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
Norway	394	572	386	569
Poland	5.453	7.716	5.617	8.026
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	10.993	16.489
TOTAL EUROPE	61.913	91.675	62.911	85.708

B20

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
Norway	553	567
Poland	776	798
Romania	464	457
Spain	617	651
Sweden	562	622
Turkey	723	754
United Kingdom	466	468
TOTAL EUROPE	785	786

B21

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
Norway	1.725	1.725	321	329
Poland	2.000	2.008	388	397
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	273
TOTAL EUROPE	1.809	1.825	375	372

B22

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
Norway	5,0	5,0	0
Poland	27,0	30,0	11,11
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	31,0	0
TOTAL EUROPE	0,0	316,0	

B23

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.
Norway	41,0	42,0	2,44
Poland	n.a.	15,0	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	62,0	0,0	

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

	Austria	Benelux	croatia	Czech Republic	France	Germany	Hungary	Italy	Norway	Poland	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	14,5	12,8	6,5	0,0	0,0	5,0	0,0	4,1
2	7,1	6,7	0,0	0,1	0,0	1,6	2,8	3,3	18,0	4,6	3,7	0,0	0,0	8,1	0,0	1,9
3	6,6	6,4	0,0	12,7	0,0	4,7	5,5	10,2	9,2	7,8	5,0	0,0	0,0	8,3	0,0	3,5
4	8,2	25,1	0,0	11,7	0,0	29,5	10,7	26,8	13,6	5,4	6,0	0,0	0,0	24,8	0,0	12,8
5	9,9	6,6	0,0	7,7	0,0	6,0	2,9	11,4	5,5	5,3	7,8	0,0	0,0	4,9	0,0	3,5
6	3,0	9,4	0,0	14,2	0,0	5,4	25,5	6,2	6,4	16,9	18,0	0,0	0,0	17,9	0,0	5,6
7	6,7	3,3	0,0	13,5	0,0	16,5	6,7	4,3	7,2	11,3	29,0	0,0	0,0	3,9	0,0	8,0
8	1,6	0,3	0,0	6,4	0,0	3,1	13,4	3,4	0,9	5,4	0,1	0,0	0,0	1,3	0,0	2,0
9	4,5	2,8	0,0	6,3	0,0	4,0	4,6	3,1	0,0	0,7	3,0	0,0	0,0	0,6	0,0	1,9
10	5,5	2,5	0,0	0,2	0,0	6,4	3,5	3,1	0,0	2,2	2,0	0,0	0,0	3,5	0,0	2,6
11	1,4	2,7	0,0	0,4	0,0	6,6	0,7	1,8	5,5	0,5	0,1	0,0	0,0	3,5	0,0	2,5
12	1,1	1,7	0,0	7,3	0,0	5,3	0,0	4,0	0,0	5,7	0,1	0,0	0,0	0,0	0,0	2,6
13	3,4	8,4	0,0	6,9	0,0	4,3	11,3	9,8	1,6	6,3	6,7	0,0	0,0	5,5	0,0	3,3
14	21,9	10,5	0,0	9,2	0,0	2,9	9,1	1,5	17,6	15,1	12,0	0,0	0,0	12,7	0,0	4,3
Total	100,0	100,0	n.a.	100,0	n.a.	99,9	100,0	100,0	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 |

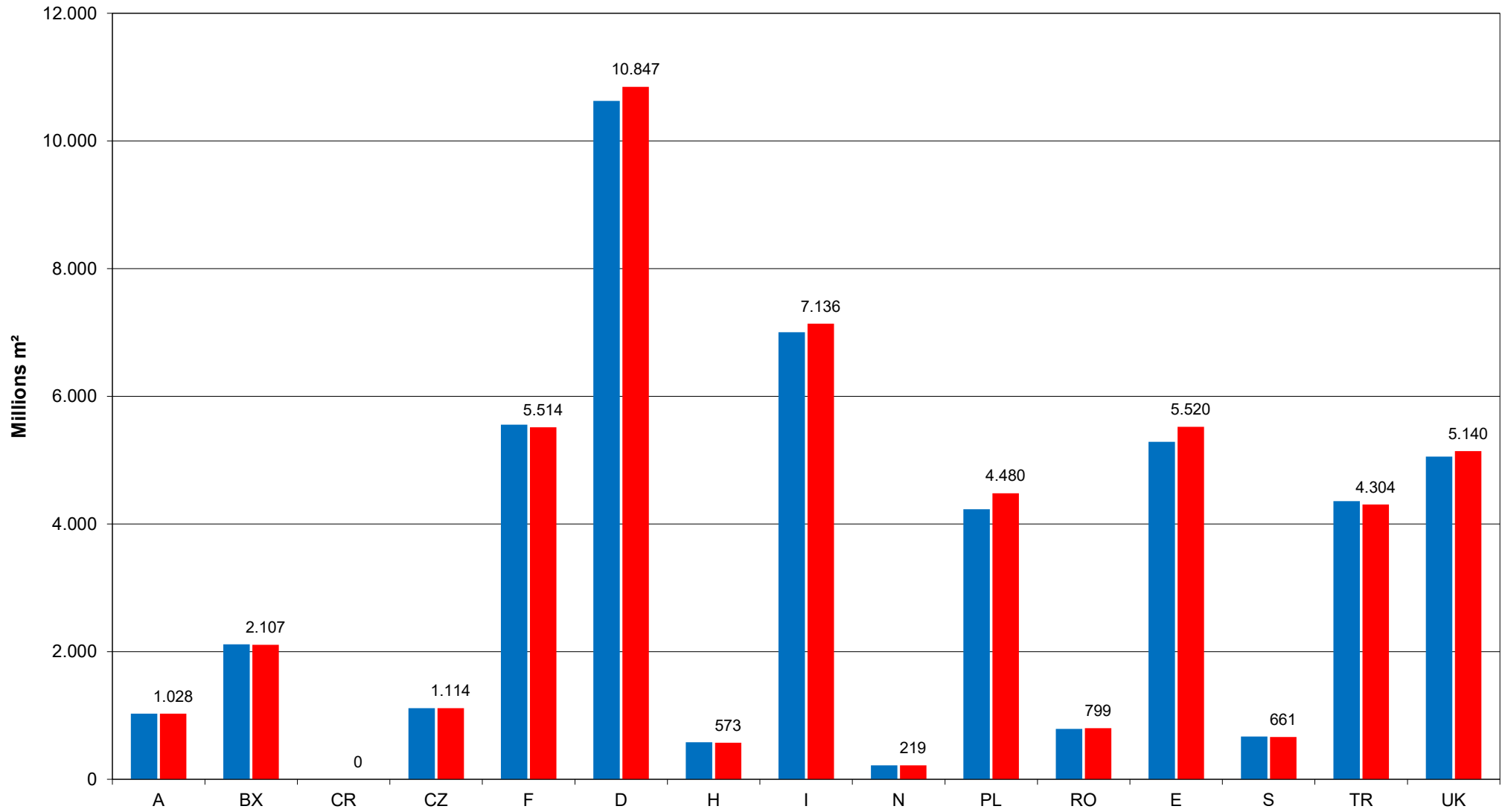
Fluting Types in % of Total Shipments 2019

	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.
Norway	48,3	28,5	6,3	14,5	0,6	1,8
Poland	44,8	15,3	10,8	13,8	0,0	15,2
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	27,6	12,4	15,6	8,9	0,3	8,7

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.
Norway	33,3	30,0	17,5	11,5	7,9	33,4	30,6	17,6	11,0	7,4	0,3	2,0	0,6	-4,3	-6,3
Poland	47,2	21,0	10,2	12,1	9,6	47,5	19,6	10,8	12,4	9,7	0,6	-6,7	5,9	2,5	1,0
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.

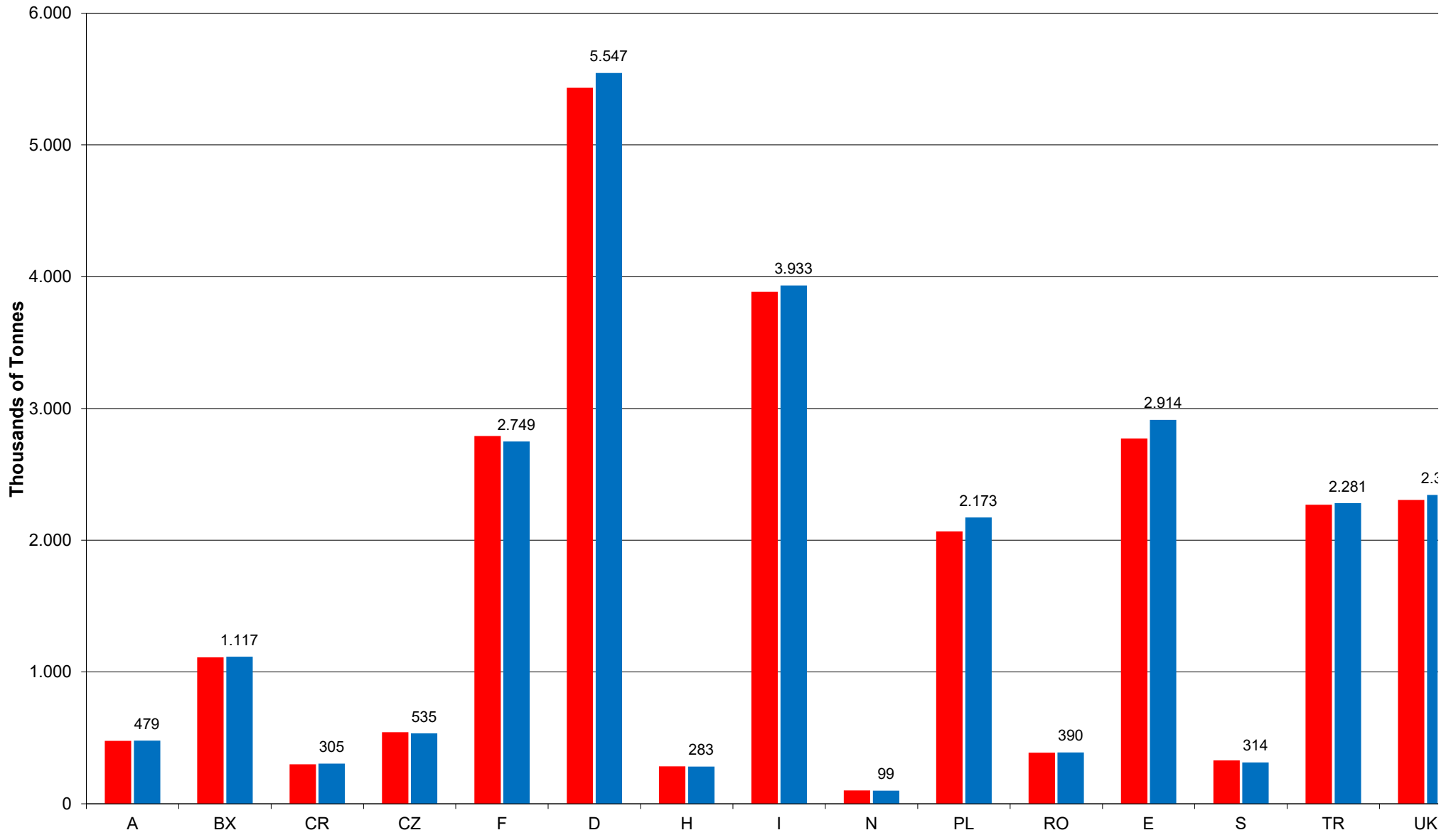
Shipments in Millions m²

■ 2018 ■ 2019



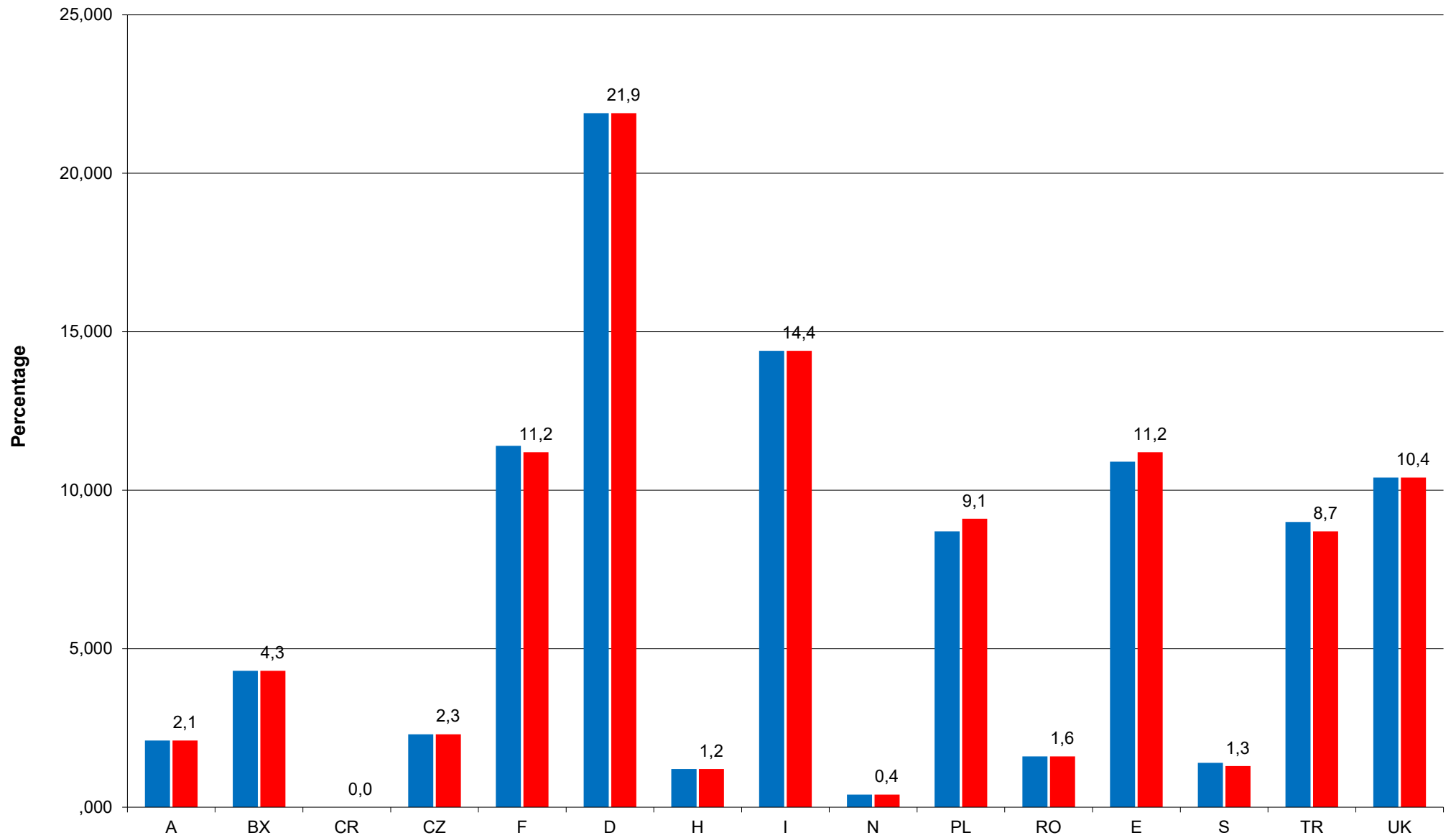
Shipments in '000 Tonnes

■ 2018 ■ 2019

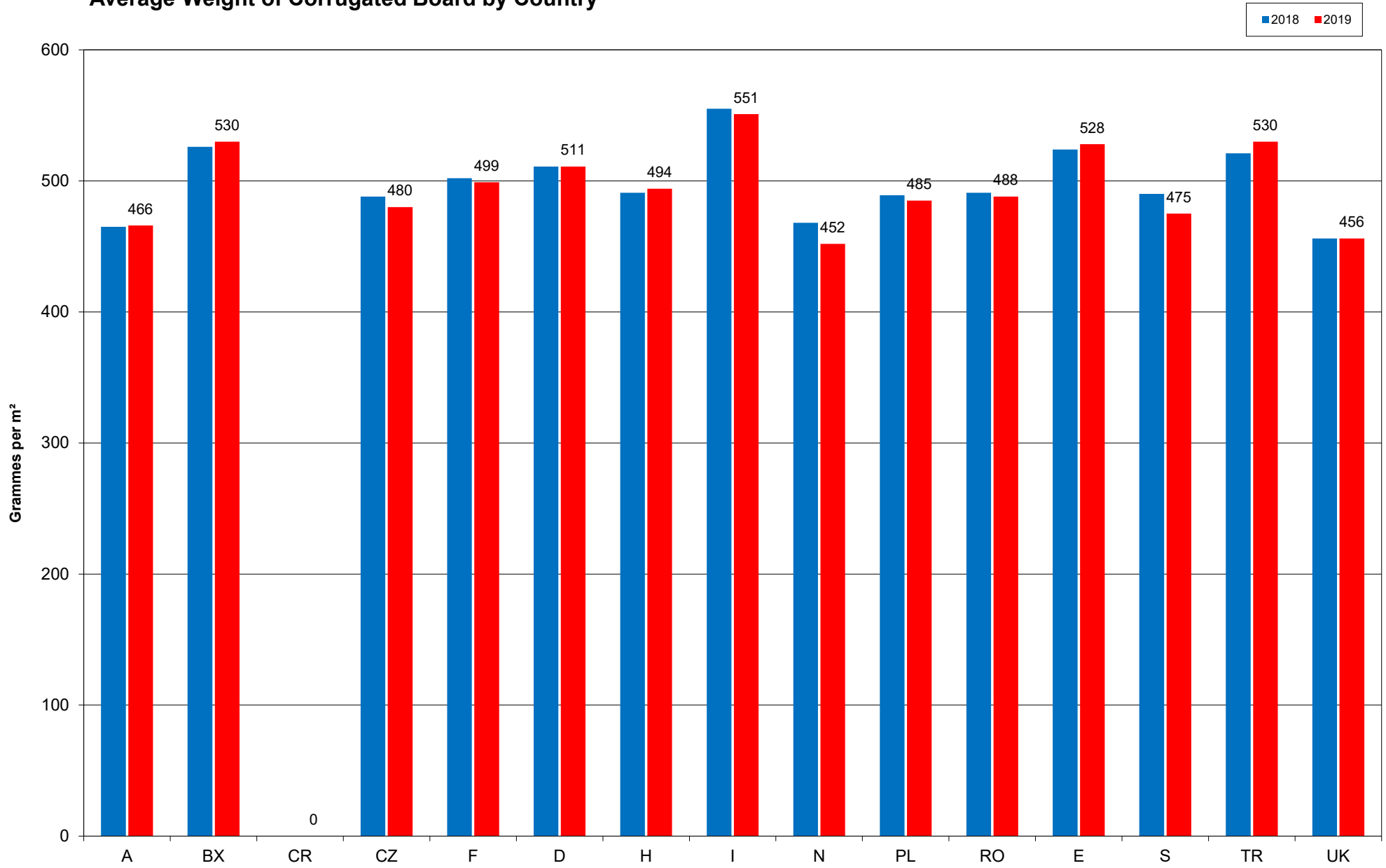


Relative Share of Total Shipments by Country (based on m²)

■ 2018 ■ 2019



Average Weight of Corrugated Board by Country



Fluting Type

