

Annual Statistics 2020

FEFCO ANNUAL STATISTICS 2020

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FEFCO ANNUAL REPORT 2020 Key Statistics

	2019	2020	% Change
Total Shipments (Millions of m ²) (including Non-Members)	49.437	50.914	3,0
Total Shipments ('000 Tonnes) (including Non-Members)	25.290	25.740	1,8
Shipments of Member Companies (Millions of m ²)	39.169	38.723	-1,1
Shipments of Member Companies ('000 Tonnes)	19.843	19.387	-2,4
Total Number of Companies (including Non-Members)	367	373	1,6
Total Number of Plants (including Non-Members)	637	646	1,4
Average Weight of Board in g/m ² (including Non-Members)	512	506	-1,2
Total Consumption of Raw Materials ('000 Tonnes) (including Non-Members)	21.124	21.495	1,8
Consumption of White or Colored Kraftliner as % of total consumption of Raw Materials	6,8	6,4	-6,2
Consumption of Brown Kraftliner as % of total consumption of Raw Materials	12,8	12,8	0
Consumption of White Top Testliner as % of total consumption of Raw Materials	5,6	6,3	11,1
Consumption of Testliner as % of total consumption of Raw Materials	30,8	31,3	1,6
Consumption of Other Recycled Liner as % of total consumption of Raw Materials	4,5	4,3	-4,7
Consumption of Semi-chemical Fluting as % of total consumption of Raw Materials	4,2	3,6	-16,7
Consumption of Recycled Fluting as % of total consumption of Raw Materials	37,2	37,3	0,3
Total Personnel	92.810	95.541	2,9
Shipments to CONVERTERS (in %)	24,0	23,5	-3,5
Shipments to TRADERS (in %)	10,0	11,7	18,7

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

	2019	2020	% Change 2019/2020	Members Only
Austria	1.028	1.044	1,56	Y / Y
Benelux	2.107	2.058	-2,33	N / N
Croatia	n.a.	n.a.	n.a.	n.a. / n.a.
Czech Republic	1.114	1.192	7,00	N / N
France	5.514	5.349	-2,99	N / N
Germany	10.842	11.270	3,95	N / N
Hungary	573	574	0,17	N / N
Italy	7.136	7.354	3,05	N / N
Norway	219	228	4,11	Y / Y
Poland	4.480	4.722	5,40	N / N
Romania	799	807	1,00	Y / Y
Spain	5.520	5.552	0,58	N / N
Sweden	661	660	-0,15	Y / Y
Turkey	4.304	4.815	11,87	N / N
United Kingdom	5.140	5.289	2,90	N / N
TOTAL EUROPE	49.437	50.914	3,00	

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

	2019	2020	% Change 2019/2020
Austria	479	489	2,09
Benelux	1.117	1.074	-3,85
Croatia	134	137	2,24
Czech Republic	535	568	6,17
France	2.749	2.633	-4,22
Germany	5.545	5.726	3,26
Hungary	283	284	0,35
Italy	3.933	4.000	1,70
Norway	99	104	5,05
Poland	2.173	2.269	4,42
Romania	390	395	1,28
Spain	2.914	2.871	-1,48
Sweden	314	320	1,91
Turkey	2.281	2.490	9,16
United Kingdom	2.344	2.380	1,54
TOTAL EUROPE	25.290	25.740	1,80

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Shipments of Member Companies in Millions of m²

	2019	2020	% Change 2019/2020
Austria	1.028	1.044	1,56
Benelux	2.002	1.955	-2,35
Croatia	299	295	-1,34
Czech Republic	751	809	7,72
France	3.926	3.755	-4,36
Germany	7.912	8.103	2,41
Hungary	533	534	0,19
Italy	5.809	4.561	-21,48
Norway	219	228	4,11
Poland	3.792	4.015	5,88
Romania	799	807	1,00
Spain	4.207	4.231	0,57
Sweden	661	660	-0,15
Turkey	3.061	3.467	13,26
United Kingdom	4.170	4.259	2,13
Membership Total	39.169	38.723	-1,10

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Shipments of Member Companies in 000's Tonnes

	Membership 2019		Membership 2020	
	Tonnes	% of total shipments	Tonnes	% of total shipments
Austria	479	100,00	489	100,00
Benelux	1.061	94,99	1.020	94,97
Croatia	132	98,51	132	96,35
Czech Republic	353	65,98	384	67,61
France	1.965	71,48	1.848	70,19
Germany	4.020	72,50	4.076	71,18
Hungary	263	92,93	264	92,96
Italy	3.230	82,13	2.536	63,40
Norway	99	100,00	104	100,00
Poland	1.830	84,22	1.921	84,66
Romania	390	100,00	395	100,00
Spain	2.220	76,18	2.188	76,21
Sweden	314	100,00	320	100,00
Turkey	1.585	69,49	1.793	72,01
United Kingdom	1.902	81,14	1.917	80,55
Membership Total	19.843	78,50	19.387	75,30

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Total Number of Corrugating Companies (including Non-Members)

	2019	2020
Austria	6	6
Benelux	n.a.	n.a.
Croatia	n.a.	5
Czech Republic	7	7
France	13	10
Germany	42	42
Hungary	8	8
Italy	44	44
Norway	3	3
Poland	42	45
Romania	11	11
Spain	71	71
Sweden	4	4
Turkey	89	95
United Kingdom	27	27
TOTAL EUROPE	367	378

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Total Number of Corrugating Plants (including Non-Members)

	2019	2020
Austria	9	9
Benelux	n.a.	n.a.
Croatia	n.a.	5
Czech Republic	9	9
France	62	62
Germany	125	125
Hungary	10	10
Italy	69	69
Norway	3	3
Poland	57	60
Romania	12	13
Spain	89	89
Sweden	10	10
Turkey	114	119
United Kingdom	68	68
TOTAL EUROPE	637	651

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Total Number of Corrugators (including Non-Members)

	2020			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	21	99
Norway	n.a.	2	1	3
Poland	n.a.	n.a.	n.a.	n.a.
Romania	1	12	n.a.	13
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	315	83	452

B9

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

	2019	2020
Austria	466	468
Benelux	530	522
Croatia	n.a.	n.a.
Czech Republic	480	477
France	499	492
Germany	511	508
Hungary	494	495
Italy	551	544
Norway	452	456
Poland	485	481
Romania	488	489
Spain	528	517
Sweden	475	485
Turkey	530	517
United Kingdom	456	450
TOTAL EUROPE as weighted average	512	506

B10

Die Cut Boxes

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

	2019	2020
Austria	53,2	55,0
Benelux	33,4	31,9
Croatia	n.a.	n.a.
Czech Republic	32,3	31,4
France	n.a.	n.a.
Germany	49,6	50,1
Hungary	58,5	57,6
Italy	n.a.	n.a.
Norway	60,5	62,8
Poland	40,8	42,4
Romania	33,0	36,8
Spain	n.a.	n.a.
Sweden	60,0	51,0
Turkey	n.a.	n.a.
United Kingdom	43,2	49,9
TOTAL EUROPE as weighted average	45,1	46,7

B11

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

	2019	2020	% Change 2019/2020
Austria	554	558	0,72
Benelux	1.137	1.114	-2,02
Croatia	n.a.	n.a.	n.a.
Czech Republic	400	438	9,50
France	n.a.	n.a.	n.a.
Germany*	5.838	6.033	3,34
Hungary	301	307	1,99
Italy	4.083	4.120	0,91
Norway	108	107	-0,93
Poland	2.260	2.360	4,42
Romania	413	436	5,57
Spain	3.232	3.184	-1,49
Sweden	317	340	7,26
Turkey	n.a.	n.a.	n.a.
United Kingdom	2.481	2.498	0,69
TOTAL EUROPE	21.124	21.495	1,80

*includes members only

B12

Consumption of White or Colored Kraftliner

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

	2019	2020
Austria	7,4	5,8
Benelux	5,9	5,4
Croatia	n.a.	23,2
Czech Republic	4,7	3,7
France	n.a.	n.a.
Germany	n.a.	n.a.
Hungary	2,7	3,0
Italy	8,5	7,9
Norway	21,0	24,8
Poland	2,0	2,2
Romania	2,0	1,8
Spain	6,6	5,4
Sweden	3,0	8,0
Turkey	1,6	2,2
United Kingdom	10,7	10,5
TOTAL EUROPE as weighted average	6,8	6,4

B13

Brown Kraftliner

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

	2019	2020
Austria	13,1	14,0
Benelux	14,2	14,9
Croatia	n.a.	40,0
Czech Republic	10,3	11,5
France	n.a.	n.a.
Germany	n.a.	n.a.
Hungary	13,9	12,5
Italy	16,3	15,8
Norway	12,1	8,9
Poland	8,8	9,0
Romania	12,0	14,0
Spain	13,4	14,1
Sweden	31,0	28,0
Turkey	14,9	14,8
United Kingdom	7,3	6,8
TOTAL EUROPE as weighted average	12,8	12,8

B14

WHITE TOP TESTLINER

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

	2019	2020
Austria	6,7	8,8
Benelux	3,6	5,5
Croatia	n.a.	19,4
Czech Republic	7,9	7,5
France	n.a.	n.a.
Germany	n.a.	n.a.
Hungary	4,8	4,9
Italy	1,6	1,5
Norway	11,5	0,6
Poland	12,3	14,2
Romania	7,0	7,5
Spain	6,0	6,4
Sweden	n.a.	n.a.
Turkey	5,4	5,6
United Kingdom	n.a.	n.a.
TOTAL EUROPE as weighted average	5,6	6,3

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

	2019	2020
Austria	29,9	28,3
Benelux	41,2	46,6
Croatia	n.a.	14,1
Czech Republic	33,9	35,2
France	n.a.	n.a.
Germany	n.a.	n.a.
Hungary	34,8	34,1
Italy	22,2	22,3
Norway	19,2	29,4
Poland	37,1	33,1
Romania	30,0	29,0
Spain	27,4	29,6
Sweden	30,0	31,0
Turkey	21,5	21,9
United Kingdom	38,6	39,9
TOTAL EUROPE as weighted average	30,8	31,3

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Consumption of Other Liners

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

	2019	2020
Austria	2,4	2,4
Benelux	5,6	4,6
Croatia	n.a.	n.a.
Czech Republic	2,3	2,0
France	n.a.	n.a.
Germany	n.a.	n.a.
Hungary	5,7	4,8
Italy	4,6	4,4
Norway	n.a.	n.a.
Poland	1,9	2,1
Romania	8,0	7,5
Spain	5,8	5,8
Sweden	n.a.	n.a.
Turkey	10,2	6,5
United Kingdom	n.a.	n.a.
TOTAL EUROPE as weighted average	4,5	4,3

B17

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

	2019	2020
Austria	7,9	9,8
Benelux	0,9	0,8
Croatia	n.a.	3,3
Czech Republic	0,1	0,1
France	n.a.	n.a.
Germany	n.a.	n.a.
Hungary	2,6	3,4
Italy	8,0	6,4
Norway	15,7	18,8
Poland	0,7	0,6
Romania	6,0	5,6
Spain	4,3	4,1
Sweden	10,0	5,0
Turkey	3,6	6,5
United Kingdom	0,9	0,6
TOTAL EUROPE as weighted average	4,2	3,6

B18

Consumption of Other Fluting (Recycled paper basis)

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

	2019	2020
Austria	32,6	30,9
Benelux	28,6	22,2
Croatia	n.a.	n.a.
Czech Republic	40,8	40,0
France	n.a.	n.a.
Germany	n.a.	n.a.
Hungary	35,5	37,3
Italy	38,8	41,7
Norway	20,5	17,5
Poland	37,2	38,8
Romania	35,0	34,6
Spain	36,5	34,7
Sweden	26,0	28,0
Turkey	42,8	42,5
United Kingdom	42,5	42,2
TOTAL EUROPE as weighted average	37,2	37,3

B19

Total Number of Personnel

	2019		2020	
	Production Employees	Total Employees	Production Employees	Total Employees
Austria	1.366	1.901	1.390	1.882
Benelux	2.634	3.695	2.783	3.733
Croatia	n.a.	n.a.	162	188
Czech Republic	1.656	2.160	1.647	2.158
France	n.a.	n.a.	n.a.	n.a.
Germany	15.098	20.768	14.891	20.589
Hungary	1.339	1.998	1.324	1.991
Italy	6.420	14.460	6.620	14.910
Norway	386	569	391	593
Poland	5.617	8.026	5.828	8.286
Romania	1.750	2.375	2.314	3.461
Spain	8.480	11.266	8.414	11.185
Sweden	1.063	1.489	1.033	1.474
Turkey	5.711	7.614	6.487	8.509
United Kingdom	10.993	16.489	11.180	16.770
TOTAL EUROPE	62.513	92.810	64.464	95.729

B20

Production per Head in 1000 m²

	2019	2020
Austria	753	751
Benelux	800	739
Croatia	n.a.	n.a.
Czech Republic	673	724
France	n.a.	n.a.
Germany	718	757
Hungary	428	434
Italy	1.112	1.111
Norway	567	583
Poland	798	810
Romania	457	349
Spain	651	660
Sweden	622	639
Turkey	754	742
United Kingdom	468	473
TOTAL EUROPE	791	790

B21

Nominal Working Time and Productivity per Head

	Working Time [hours / year]		Productivity [m ² /Person hour]	
	2019	2020	2019	2020
Austria	1.705	1.707	441	440
Benelux	1.819	1.747	440	423
Croatia	n.a.	2.000	n.a.	n.a.
Czech Republic	1.882	1.882	357	385
France	n.a.	n.a.	n.a.	n.a.
Germany	1.743	1.771	412	427
Hungary	1.848	1.848	232	235
Italy	2.024	2.040	549	545
Norway	1.725	1.713	329	340
Poland	2.008	2.024	397	400
Romania	1.832	1.866	249	187
Spain	1.768	1.768	368	373
Sweden	1.472	1.498	422	427
Turkey	1.984	2.008	380	370
United Kingdom	1.710	1.710	273	277
TOTAL EUROPE	1.809	1.827	373	371

B22

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

	2019	2020	% Change 2019/2020
Austria	10,0	11,7	17,00
Benelux	39,4	35,6	-9,77
Croatia	n.a.	n.a.	n.a.
Czech Republic	38,0	36,0	-5,26
France	n.a.	n.a.	n.a.
Germany	6,0	6,0	0
Hungary	95,0	93,0	-2,11
Italy	38,0	38,0	0
Norway	5,0	5,0	0
Poland	30,0	29,0	-3,33
Romania	34,0	30,0	-11,76
Spain	15,4	15,0	-2,47
Sweden	n.a.	n.a.	n.a.
Turkey	n.a.	n.a.	n.a.
United Kingdom	31,1	31,8	2,25
TOTAL EUROPE	24,0	23,5	

B23

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

	2019	2020	% Change 2019/2020
Austria	8,0	7,2	-10,00
Benelux	3,7	6,3	71,82
Croatia	n.a.	n.a.	n.a.
Czech Republic	n.a.	n.a.	n.a.
France	n.a.	n.a.	n.a.
Germany	8,9	9,0	1,12
Hungary	5,0	6,6	32,00
Italy	n.a.	n.a.	n.a.
Norway	42,0	41,5	-1,19
Poland	15,0	21,0	40,00
Romania	n.a.	10,0	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	10,0	11,7	

Classification of shipment by end-use sector, as a percentage of turnover 2020

	Austria	Benelux	Croatia	Czech Republic	France	Germany	Hungary	Italy	Norway	Poland	Romania	Spain	Sweden	Turkey	United Kingdom	Weighted Average
1	13,4	20,9	0,0	0,9	0,0	3,4	2,8	10,9	13,8	13,4	5,8	25,1	0,0	7,0	0,0	8,2
2	2,6	2,4	0,0	0,6	0,0	1,6	2,6	3,8	17,6	4,7	3,8	8,9	0,0	10,3	0,0	2,8
3	6,1	5,7	0,0	11,7	0,0	5,6	5,1	11,6	10,1	6,8	4,6	5,3	0,0	3,8	0,0	4,2
4	15,3	20,8	0,0	14,2	0,0	28,5	11,0	27,1	12,7	12,9	7,6	21,2	0,0	26,2	0,0	16,8
5	10,3	6,4	0,0	6,3	0,0	6,1	3,1	11,1	5,1	5,1	7,2	9,0	0,0	5,1	0,0	4,9
6	10,8	10,8	0,0	17,2	0,0	5,7	25,8	9,1	7,6	11,6	17,9	5,3	0,0	10,7	0,0	5,8
7	8,3	2,4	0,0	10,8	0,0	16,3	6,1	3,0	6,4	10,4	25,4	1,7	0,0	12,7	0,0	7,7
8	0,5	0,2	0,0	7,0	0,0	3,2	14,8	2,1	1,0	5,0	0,7	0,7	0,0	1,4	0,0	2,0
9	5,5	3,7	0,0	3,9	0,0	3,5	3,7	1,2	0,0	0,8	2,8	2,5	0,0	2,1	0,0	2,3
10	5,1	4,0	0,0	1,9	0,0	5,9	4,0	3,0	0,0	2,1	1,8	4,7	0,0	3,0	0,0	3,5
11	1,1	3,0	0,0	0,8	0,0	4,5	0,4	1,9	5,7	0,2	0,2	2,1	0,0	2,9	0,0	2,3
12	3,4	2,1	0,0	8,9	0,0	6,5	0,0	7,2	0,0	9,5	0,8	2,3	0,0	0,1	0,0	3,4
13	10,0	5,8	0,0	7,0	0,0	4,0	11,3	6,4	1,5	6,9	6,2	3,4	0,0	2,4	0,0	3,3
14	7,6	11,8	0,0	8,8	0,0	5,1	9,3	1,6	18,5	10,6	15,2	7,8	0,0	12,3	0,0	5,5
Total	100,0	100,0	n.a.	100,0	n.a.	99,9	100,0	100,0	100,0	100,0	100,0	100,0	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 |

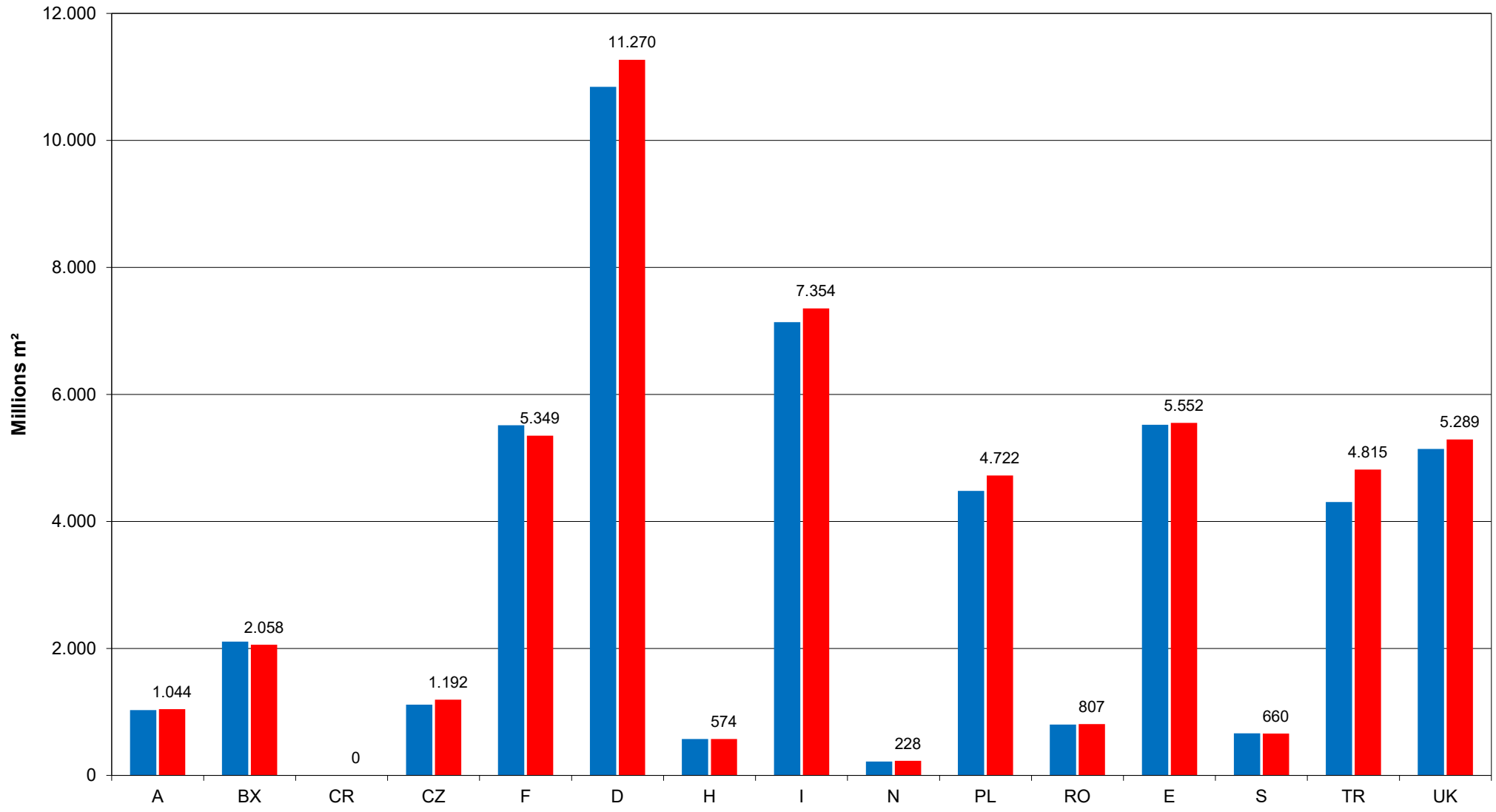
Fluting Types in % of Total Shipments 2020

	B-flute	C-flute	BC-flute	E-flute	Micro-FI	Others
Austria	36,8	15,7	10,8	20,4	1,1	15,2
Benelux	47,4	12,4	10,2	7,1	0,9	22,0
Croatia	61,3	18,2	8,3	8,3	3,9	0,0
Czech Republic	48,9	8,3	12,9	16,9	0,0	13,0
France	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Germany	35,9	11,4	15,6	14,7	3,8	18,6
Hungary	37,7	15,3	17,1	16,2	0,7	13,0
Italy	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Norway	49,5	26,6	6,5	14,9	0,6	2,0
Poland	43,9	14,9	11,0	14,9	0,4	14,9
Romania	35,8	20,5	18,7	15,0	0,0	10,0
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	22,9	20,8	40,6	10,1	0,0	5,6
United Kingdom	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Total Europe as weighted average	28,1	12,0	13,2	9,4	0,5	8,9

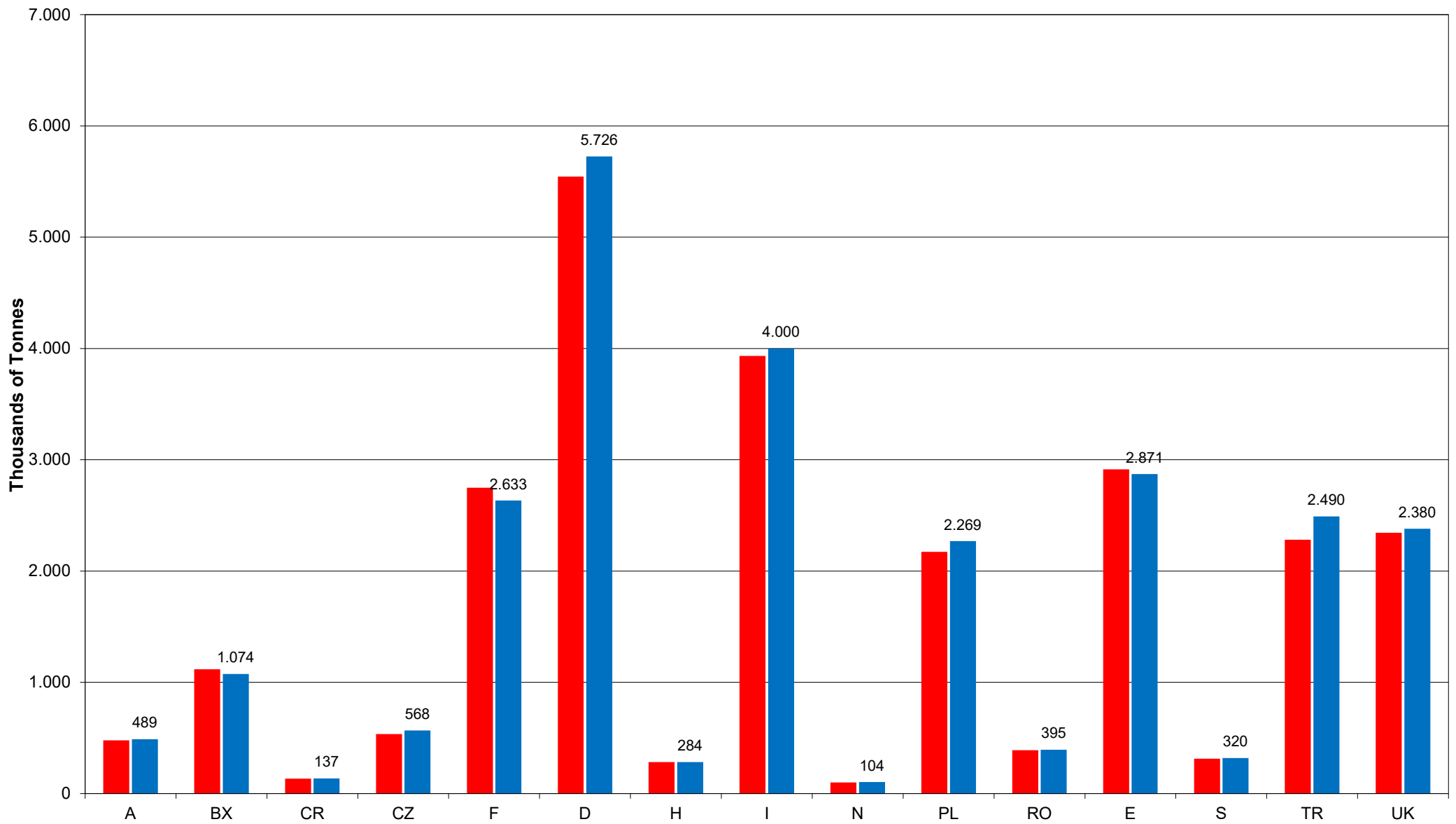
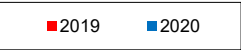
Countries	% of the Products by Number of Printing Colours										% Changes				
	2019					2020					2019 / 2020				
	0	1	2	3	> 3	0	1	2	3	> 3	0	1	2	3	> 3
Austria	35,4	34,2	11,0	8,4	11,0	35,6	33,7	11,9	8,1	10,7	0,6	-1,5	8,2	-3,6	-2,7
Benelux	34,7	39,3	14,6	5,6	5,8	34,2	39,4	14,7	6,0	5,7	-1,4	0,3	0,7	7,1	-1,7
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	28,1	41,2	15,3	6,9	8,5	33,1	35,9	12,5	11,6	6,9	17,8	-12,9	-18,3	68,1	-18,8
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	27,5	33,3	14,7	9,7	14,8	26,6	34,0	14,8	10,3	14,3	-3,3	2,1	0,7	6,2	-3,4
Hungary	36,7	32,4	11,5	7,9	11,5	39,0	33,0	10,3	6,8	10,9	6,3	1,9	-10,4	-13,9	-5,2
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	33,4	30,6	17,6	11,0	7,4	36,6	30,7	16,1	10,4	6,2	9,6	0,3	-8,5	-5,5	-16,2
Poland	47,5	19,6	10,8	12,4	9,7	46,5	20,1	11,4	12,4	9,6	-2,1	2,6	5,6	0,0	-1,0
Romania	36,0	33,0	14,0	10,0	7,0	35,0	39,0	13,0	7,0	6,0	-2,8	18,2	-7,1	-30,0	-14,3
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

■ 2019 ■ 2020

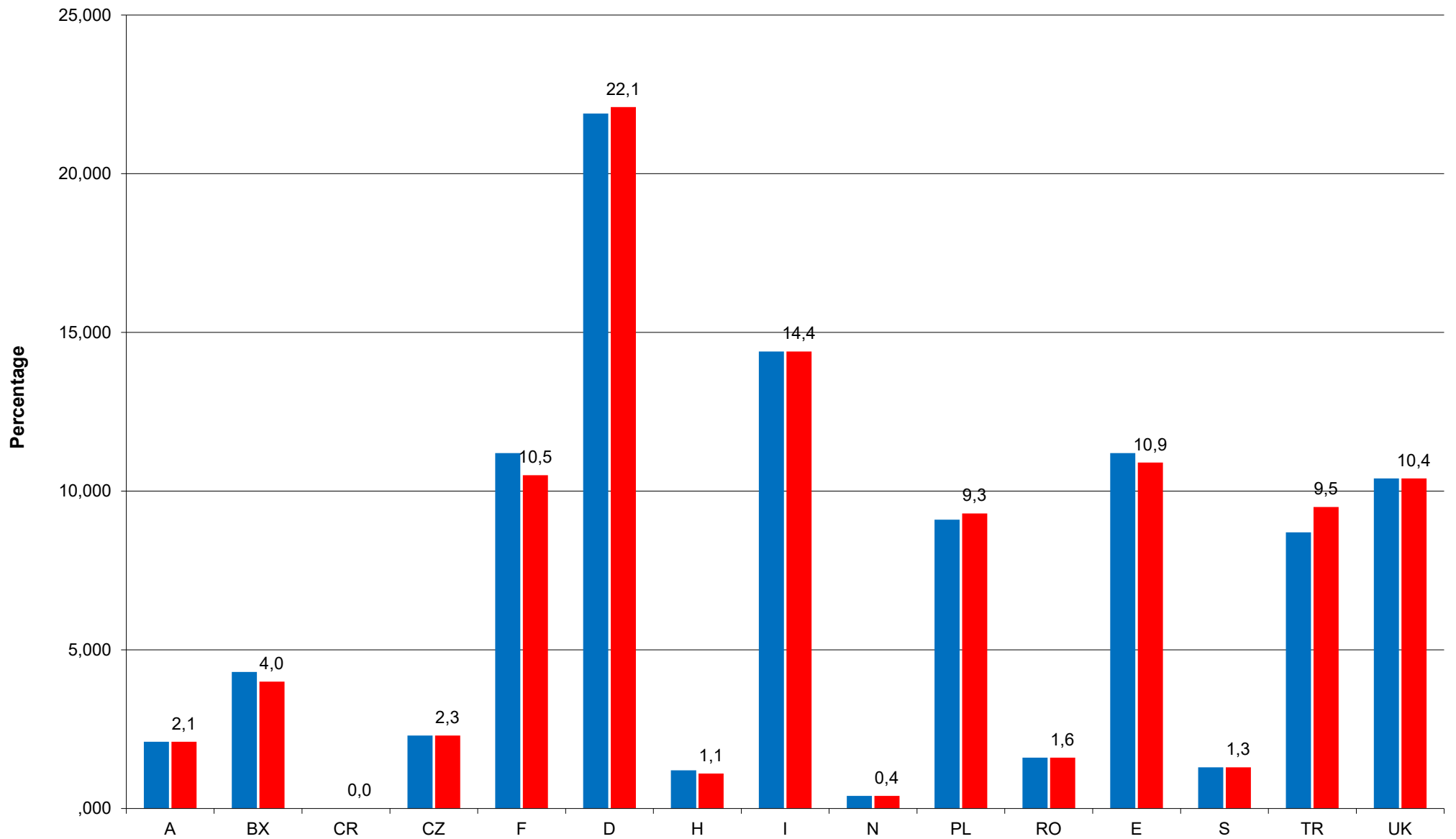


Shipments in '000 Tonnes

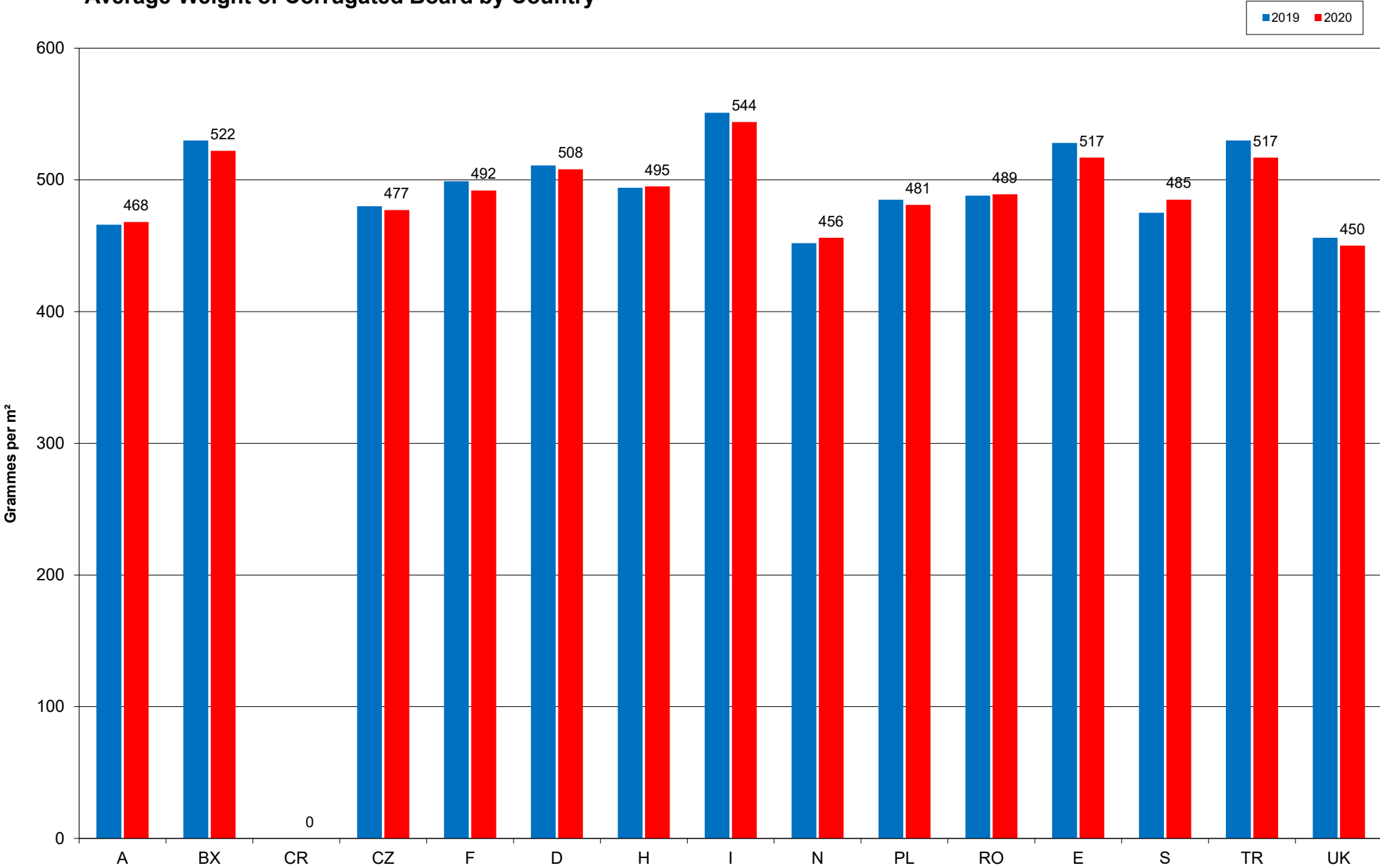


Relative Share of Total Shipments by Country (based on m²)

2019 2020



Average Weight of Corrugated Board by Country



Fluting Type

