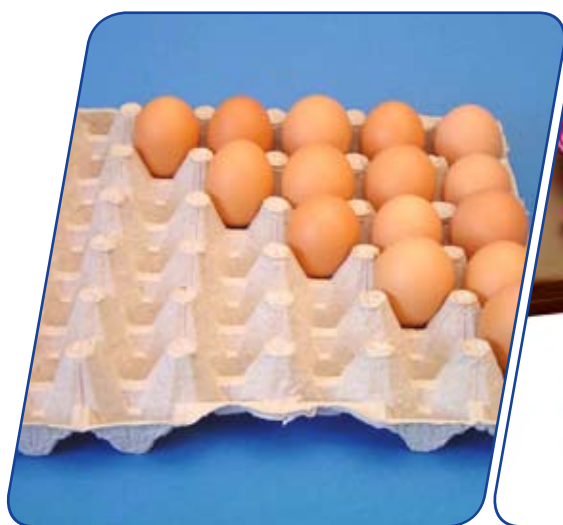


# Market Study: Corrugated Board, Solid Board and Cartonboard - Europe



## Dear readers,

Nowadays, information is available at the push of a button, always, and in overwhelming amounts. But what is the best way to find the crucial data amongst all that information? That is why several thousand companies use the knowledge of our employees. Based on their extensive experience, they provide decisive data for the benefit of their customers. The clearly arranged and practice-oriented studies of Ceresana offer precise analyses and well-founded forecasts - also for your markets!

### Why you should make use of our knowledge

Our time-tested understanding of the markets helps you to even better assess potential chances, new products and technologies, but also your competitors. Use this knowledge to shape an ever more effective and efficient future for your company. We provide you with reliable forecasts regarding products

and markets. Get valuable information about global trends as well as opportunities and risks. Our studies will save you time and money and help you prevent costly wrong decisions.

### We are your market experts

Ceresana is the most trusted market research company for the industrial sector. In addition to single-client studies, our clients also profit from already more than 90 multi-client market studies.

We would be pleased to assist your company in this challenging market environment!



Yours faithfully, Oliver Kutsch

## Our studies - Your benefits

- **Gain new customers**  
Our studies show who are potential new customers and where you can find them
- **Locate new procurement markets**  
Recognize better or alternative sources of supply
- **Improve your understanding of your competitors**  
Who exactly are your competitors - and what are their strengths and weaknesses
- **Obtain a more detailed picture of your segment**  
Learn which time is the best for entering or leaving a market
- **Have a look at the future**  
Find out if new investments and technologies are worthwhile and how to gain access to future markets. We also show possible market scenarios
- **Recognize opportunities and risks**  
Identify opportunities and risks on your target markets in time

## This study is useful for:

- Producers and merchants of corrugated board, solid board and cartonboard packaging, POS displays, transport packaging, cans, fiber drums
- Suppliers of raw materials such as paper material as well as producers of machines or printing plants in the packaging sector
- Manufacturers, distributors and bottlers of beverages, foods, stationery and household supplies, cosmetics and sanitary products, household cleaning and laundry, electrical devices etc.
- Associations and institutes
- Executive board, technology and production, strategic planning, R&D, market research, marketing, distribution and sale, procurement

## In this brochure you will find following information:

- An introduction on page 3
- A summary of the table of contents on page 4
- In the following, there are example pages from the study
- Please use the form on the last page to easily order your copy or a free reading sample!

This study on the European market offers a comprehensive overview of the production and consumption quantity as well as of trade flows of corrugated board, solid board and cartonboard packaging. The demand for corrugated board packaging will be analyzed individually in 10 applications, e.g. food & tobacco products, beverages or chemical goods. The demand for solid board & cartonboard packaging will additionally be analyzed in 14 sub-segments, such as non-alcoholic beverages, alcoholic beverages, chilled and frozen food or pharmaceutical products. Ceresana's analysts expect that the European demand for corrugated board, solid board and cartonboard packaging will rise to a total of 38.7 million tonnes by 2021. Apart from the popular rectangular cartonboard packaging, this report also counts cans, fiber drums or similar packaging made of rigid paper among solid board and cartonboard packaging.

## **Corrugated Board Profits from E-Commerce**

The unique properties of corrugated board ensure that this material is perfectly suited for shipping packaging. The excellent product protection whilst being of low weight as well as an outstanding stackability play an important role here. More and more people use mobile end devices with internet access. Online offers become available from everywhere and accessing those turns more and more into the daily routine of many customers. The turnover of e-commerce is rising in many Euro-

pean countries by more than 15 % every year! This rapid development will also stimulate the demand for shipping packaging in Europe further.

## **Shelf Ready Makes the Difference**

The growing competition from Internet trade is already having a significant impact on stationary retail trade. It is therefore all the more important to design the local workflow as efficiently as possible and to present the products on offer at the POS in an ideal way. In this context, shelf ready and retail ready packaging made of corrugated board is gaining further importance. Besides the traditional function of a secondary or transport packaging, i.e. protecting the product and keeping individual goods together, further aspects are now coming to the fore. Shelf ready and retail ready packaging are to be perfectly integrated in the process of supply, logistics, registration of goods as well as presentation and sales (easy identification, easy open, easy shelf, easy dispose, and easy shop). The transport packaging gains importance as advertising media and marketing space.

## **Folding Boxes Suited for Multi-Channel Retailing**

Folding boxes made of solid board and cartonboard can also profit from the growing importance of new distribution channels, above all the Internet. It is decisive for presenting a product online that it can be illustrated authentically, rich in contrast, clearly arranged and visually appealing. A 360-degree view of the

article should also be available. For all of these aspects, folding boxes offer the desired properties. Due to their rectangular shape, they have clearly defined contours and offer versatile and high-quality printing options. The layout options are nearly infinite; even a premium solution for a high-quality gift packaging can be realized easily. It is also relatively easy to offer the folding box packaging in different sizes, thus complying with the requirements of multi-channel retailing. When shopping online, customers more often buy family-size packs as they do not have to carry them home themselves.

## **Combination of Cartonboard and Plastics as an Opportunity**

In many areas of the packaging market, packaging solutions made of plastics gain in importance at the expense of other materials. In the case of non-alcoholic beverages, for example, PET bottles are still replacing the conventional beverage cartons in the segment fruit juices; in the segment milk, HDPE bottles gain more market shares. However, it is not always necessary to make a choice between cartonboard and plastics. In the application chilled and frozen food or even in the growing segment of ready-made meals, combinations made of both material groups are used more often. For example, a plastic tray as primary packaging is often combined with a secondary packaging made of cartonboard which is better suited for high-quality printing and brand presentation.



## 1 Market Data

- 1.1 Europe
  - 1.1.1 Demand
    - 1.1.1.1 Demand - Corrugated Board
    - 1.1.1.2 Demand - Solid Board and Cartonboard
  - 1.1.2 Production and Trade
- 1.2 Austria
  - 1.2.1 ...
- 1.3 Belgium
  - 1.3.1 ...
- 1.4 Bulgaria
  - 1.4.1 ...
- 1.5 Czechia
  - 1.5.1 ...
- 1.6 Denmark
  - 1.6.1 ...
- 1.7 Finland
  - 1.7.1 ...
- 1.8 France
  - 1.8.1 ...
- 1.9 Germany
  - 1.9.1 ...
- 1.10 Greece
  - 1.10.1 ...
- 1.11 Hungary
  - 1.11.1 ...
- 1.12 Italy
  - 1.12.1 ...
- 1.13 Lithuania
  - 1.13.1 ...
- 1.14 Norway
  - 1.14.1 ...
- 1.15 Poland
  - 1.15.1 ...
- 1.16 Portugal
  - 1.16.1 ...
- 1.17 Romania
  - 1.17.1 ...
- 1.18 Russia
  - 1.18.1 ...
- 1.19 Slovakia
  - 1.19.1 ...
- 1.20 Spain
  - 1.20.1 ...

- 1.21 Sweden
  - 1.21.1 ...
- 1.22 Switzerland
  - 1.22.1 ...
- 1.23 The Netherlands
  - 1.23.1 ...
- 1.24 Turkey
  - 1.24.1 ...
- 1.25 United Kingdom
  - 1.25.1 ...
- 1.26 Rest of Europe
  - 1.26.1 ...

## 2 Types of Packaging and Applications

- 2.1 Corrugated Board
  - 2.1.1 Food and tobacco products
  - 2.1.2 Beverages
  - 2.1.3 Textiles and leather
  - 2.1.4 Paper goods
  - 2.1.5 Chemical and rubber goods
  - 2.1.6 Household cleaning and cosmetics
  - 2.1.7 Glassware, metalware and machinery
  - 2.1.8 Electrical devices
  - 2.1.9 Shipping products
  - 2.1.10 Other applications
- 2.2 Solid Board & Cartonboard
  - 2.2.1 Non-alcoholic beverages
  - 2.2.2 Alcoholic beverages
  - 2.2.3 Chilled and frozen food
  - 2.2.4 Chocolate and sugar confectionery
  - 2.2.5 Bakery and pastry goods
  - 2.2.6 Beverage powder and tea
  - 2.2.7 Breakfast cereals
  - 2.2.8 Other food
  - 2.2.9 Pharmaceutical and medical products

- 2.2.10 Stationary and household supplies
- 2.2.11 Household cleaning and laundry
- 2.2.12 Cigarettes & tobacco products
- 2.2.13 Cosmetics and personal hygiene
- 2.2.14 Other applications

## 3 Company Profiles

- 3.1 Austria (5)
- 3.2 Belgium (4)
- 3.3 Croatia (1)
- 3.4 Czechia (1)
- 3.5 Denmark (1)
- 3.6 Finland (1)
- 3.7 France (1)
- 3.8 Germany (24)
- 3.9 Ireland (1)
- 3.10 Italy (3)
- 3.11 Norway (2)
- 3.12 Slovakia (1)
- 3.13 Spain (4)
- 3.14 Sweden (2)
- 3.15 Switzerland (8)
- 3.16 The Netherlands (2)
- 3.17 Turkey (1)
- 3.18 United Kingdom (6)

## 1.15 Poland

### 1.15.1 Demand

The demand for corrugated board, solid board and cartonboard packaging in Poland amounted to about X million tonnes in 2013. Demand rose by an average of x % p.a. since 2005. The demand in Poland for corrugated board, solid board and cartonboard packaging is expected to increase by x % p.a. to about x million tonnes until 2021.

In 1,000 tonnes	2005	2007	2009	2011	2013	2015p	2017p	2019p	2021p	2013-2021
Corrugated board	X	X	X	X	X	X	X	X	X	x % p.a.
Solid board and cartonboard	X	X	X	X	X	X	X	X	X	x % p.a.
<b>Total</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>x % p.a.</b>

Table: Demand for corrugated board, solid board and cartonboard packaging in Poland from 2005 to 2021 - split by types of material

#### 1.15.1.1 Demand - Corrugated Board Packaging

The application food and tobacco products represented the largest sales market in Poland in 2013. Electrical devices are the second largest application of corrugated board packaging in Poland. For the following eight years, we forecast the highest growth rate for the application shipping products with an average of x % p.a.

In Poland, observations were made in recent years that the demand for products at favorable prices in the category clothing and footwear has been increasing. We are expecting a slow recovery of the economic situation in Poland in the future. This recovery will have a positive effect on the demand for clothing and footwear.

The chemical industry in Poland is continuing to grow. This area is expected to be sustained by the automotive and construction industry over the next few years. The continuing demand for pharmaceuticals and cosmetics is sustaining the production of chemical goods as well.

In 1,000 tonnes	2005	2007	2009	2011	2013	2015p	2017p	2019p	2021p	2013-2021
Food and tobacco	X	X	X	X	X	X	X	X	X	X% p.a.
Beverages	X	X	X	X	X	X	X	X	X	X% p.a.
Textiles and leather	X	X	X	X	X	X	X	X	X	X% p.a.
Paper goods	X	X	X	X	X	X	X	X	X	X% p.a.
Chemical and rubber goods	X	X	X	X	X	X	X	X	X	X% p.a.
Cleaning and cosmetics	X	X	X	X	X	X	X	X	X	X% p.a.
Glass, metal and machinery	X	X	X	X	X	X	X	X	X	X% p.a.
Electrical devices	X	X	X	X	X	X	X	X	X	X% p.a.
Shipping products	X	X	X	X	X	X	X	X	X	X% p.a.
Other applications	X	X	X	X	X	X	X	X	X	X% p.a.
<b>Total</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X% p.a.</b>

Table: Demand for corrugated board packaging in Poland - split by applications

### 1.15.2 Production and Trade

The production of corrugated board, solid board and cartonboard packaging in Poland amounted to x million tonnes in 2013. We expect an output of about x million tonnes in 2021. Compared to 2013, this corresponds to an increase by an average of x % p.a.

**Chapter 1:** Extensive market data for Europe and 24 countries:

- Demand split by types of packaging
- Demand split by applications
- Production, import and export

## 2.1.1 Corrugated Board - Food and Tobacco Products

All foods apart from beverages fall within the category food and tobacco products. The demand for corrugated board packaging in the application food and tobacco products increased from 2005 to 2013. We expect a positive development over the next few years as well, as nearly 80 % of packaged and fresh foods for the European Market are transported in corrugated board packaging. Due to the free trade within the EU and a further growth of global trade, the trade volume in this segment will tend to increase further. More and more consumers are expecting the constant availability of an ever larger variety of foods in retail. The advantages of corrugated board are its good protective function both for storage as well as for transport and in retail. In addition, consumers consider them. These overriding trends and priorities of national markets in the application food and tobacco products of important sub-segments of consumption preferences on this parameter.

In Europe, the demand for food and tobacco products among consumers has thereby increased by. France and Russia, followed by Germany, Poland and Slovakia, show a slight decrease annually by about

**Chapter 2:** Demand for corrugated board packaging for 24 countries, split by the respective applications such as:

- Food and tobacco products
- Beverages
- Textiles and leather
- Paper goods
- Chemical and rubber goods
- Household cleaning & cosmetics
- Glassware, metalware & machinery
- Electrical devices
- Shipping products
- Other applications

## 2.2.5 Solid Board and Cartonboard - Bakery and Pastry

Cartonboard packaging for pastries, biscuits, etc. will only develop far below average over the next few years. The competition from rigid or flexible packaging made out of plastics will continue to limit the demand for cardboard packaging in this valuable premium segment.

**Chapter 2:** Demand for solid board and cartonboard for 24 countries, split by the respective applications such as:

- Non-alcoholic beverages
- Alcoholic beverages
- Chilled and frozen food
- Chocolate and sugar confectionery
- Bakery and pastry goods
- Beverage powder and tea
- Breakfast cereals
- Other food
- Pharmaceutical and medical products
- Stationary and household supplies
- Household cleaning and laundry
- Cigarettes and tobacco products
- Cosmetics and personal hygiene
- Other applications

In 1,000 tonnes
Belgium
Bulgaria
Denmark
Germany
Finland
France
Greece
United Kingdom
Italy
Lithuania
The Netherlands
Norway
Austria
Poland
Portugal
Romania
Russia
Sweden
Switzerland
Slovakia
Spain
Czechia
Turkey
Hungary
Rest of Europe
<b>Total</b>

Table: European demand for solid board and cartonboard packaging in the application area of bakery and pastry goods from 2005 to 2021 - split by countries

**Huhtamäki Oyj**  
**Miestentie 9,**  
**02150 Espoo,**  
**Finland**  
 Tel.: 358 10 686 7000  
 Web: www.huhtamaki.com

Financial Key Data	2011	2012	2013	2014
(in billion €)				
Total revenues	2.04	2.32	2.34	2.24
Net profit	0.09	0.12	0.09	0.14

**General information about the company**

**Divisions** The company has four divisions:

**Product Range**

- Flexible Packaging: food and beverages, personal care and household, pet food, pharma and medical, tube laminates, labels. The segment serves global markets from production units in Europe, Middle East, Asia and South America.

**Production Sites** The company has production sites in 24 countries.

**Chapter 3:** In-depth profiles for Europe's largest manufacturers, including Tetra Pak, International Paper, Smurfit Kappa, Amcor, Sonoco, DS Smith, Huhtamäki, Coveris, Mayr-Melnhof, SIG Combibloc and Essentra. (The profiles are assigned to the country in which the company is headquartered and include JVs and subsidiaries.)

**Profile Summary** Huhtamäki was founded in 1920, employed approx. 16,000 people at the end of March 2015) and has total assets of €2.30 billion (end 2014). The company consists of several subsidiaries. Divided by business segments, 34% of the 2014 net sales were generated by North America, 27% by Foodservice Europe-Asia-Oceania, 28% by Flexible Packaging and 11% by Molded Fiber.

**Chapter 3:** Data and facts on major producers, clearly arranged by:

- Contact details
- Turnover and profit
- Production sites
- Profile summary
- Product details

The company is listed on the Helsinki stock exchange.

**Specific information about Rigid Paper Packaging**

Paper cups:

- "Impresso": embossed double-walled cups for hot beverages
- "Air": soft double-walled cups for hot beverages
- "Primo": light soft double-walled cups for hot beverages
- "Bioware": compostable single-walled cups

Paper boxes:

- for soups, salads, and ice cream; also foldable packaging with and without viewing window
- Conical containers: capacity of 2.5 oz. – 64 oz
- Straight-walled containers in different sizes
- round containers: capacity of 2.5 oz. – 5 gallons
- Folding boxes

Trays:

- PET coated trays in different sizes, suitable for the use in ovens...

**Thank you very much for your confidence!**

For more than a decade, we have been supplying several 1,000 customers from more than 55 countries: Medium-sized companies, multinational enterprises as well as associations.

**Market expertise to your success.**



**Do you have further questions?  
 Please do not hesitate to contact us!**

Ceresana  
 Blarerstr. 56, 78462 Constance, Germany  
 Tel: +49 7531 94293-0 Fax -27  
 E-Mail: [info@ceresana.com](mailto:info@ceresana.com)

**Order now your**

- market studies or
- free reading samples

online at [www.ceresana.com/en](http://www.ceresana.com/en), via fax, phone or e-mail - quickly and easily.

**Order online here!**

## 1) Please Choose Market Studies

### Plastics

- |  |  |
|--|--|
| <input type="checkbox"/> <a href="#">Bioplastics (3<sup>rd</sup> edition)</a>        | <input type="checkbox"/> <a href="#">Butanol</a>                                 |
| <input type="checkbox"/> <a href="#">Engineering Plastics</a>                        | <input type="checkbox"/> <a href="#">Carbon Black (2<sup>nd</sup> ed.)</a>       |
| <input type="checkbox"/> <a href="#">Expandable Polystyrene (2<sup>nd</sup> ed.)</a> | <input type="checkbox"/> <a href="#">Catalysts</a>                               |
| <input type="checkbox"/> <a href="#">Polyamide - PA6 &amp; PA66</a>                  | <input type="checkbox"/> <a href="#">Chelating Agents (3<sup>rd</sup> ed.)</a>   |
| <input type="checkbox"/> <a href="#">Polyethylene - HDPE (3<sup>rd</sup> ed.)</a>    | <input type="checkbox"/> <a href="#">Ethylene (2<sup>nd</sup> ed.)</a>           |
| <input type="checkbox"/> <a href="#">Polyethylene - LDPE (2<sup>nd</sup> ed.)</a>    | <input type="checkbox"/> <a href="#">Flavors</a>                                 |
| <input type="checkbox"/> <a href="#">Polyethylene - LLDPE (2<sup>nd</sup> ed.)</a>   | <input type="checkbox"/> <a href="#">Fragrances</a>                              |
| <input type="checkbox"/> <a href="#">Polypropylene (3<sup>rd</sup> ed.)</a>          | <input type="checkbox"/> <a href="#">Hydrofluoric Acid &amp; Fluorochemicals</a> |
| <input type="checkbox"/> <a href="#">Polystyrene</a>                                 | <input type="checkbox"/> <a href="#">Propylene (2<sup>nd</sup> ed.)</a>          |
| <input type="checkbox"/> <a href="#">Polyurethanes &amp; Isocyanates</a>             | <input type="checkbox"/> <a href="#">Solvents (3<sup>rd</sup> ed.)</a>           |
| <input type="checkbox"/> <a href="#">Polyvinyl Chloride (3<sup>rd</sup> ed.)</a>     | <input type="checkbox"/> <a href="#">Styrene</a>                                 |
| <input type="checkbox"/> <a href="#">Silicones</a>                                   | <input type="checkbox"/> <a href="#">Surfactants (2<sup>nd</sup> ed.)</a>        |
| <input type="checkbox"/> <a href="#">Synthetic Rubber</a>                            | <input type="checkbox"/> <a href="#">Titanium Dioxide</a>                        |
| <input type="checkbox"/> <a href="#">Thermoplastic Elastomers</a>                    | <input type="checkbox"/> <a href="#">Toluene</a>                                 |
|  | <input type="checkbox"/> <a href="#">Xylene</a>                                  |

### Additives

- ☐ [Antioxidants \(2<sup>nd</sup> ed.\)](#)
- ☐ [Biocides](#)
- ☐ [Fillers \(3<sup>rd</sup> ed.\)](#)
- ☐ [Flame Retardants \(3<sup>rd</sup> ed.\)](#)
- ☐ [Pigments \(3<sup>rd</sup> ed.\)](#)
- ☐ [Plasticizers \(3<sup>rd</sup> ed.\)](#)
- ☐ [Stabilizers \(2<sup>nd</sup> ed.\)](#)

### Chemicals

- ☐ [Benzene \(2<sup>nd</sup> ed.\)](#)
- ☐ [Butadiene](#)

### Packaging

- ☐ [Bags and Sacks - Europe](#)
- ☐ [Caps & Closures - Europe](#)
- ☐ [Corrugated & Solid Board & Carton](#)
- ☐ [Flexible Packaging - Europe](#)
- ☐ [Food Packaging - Europe](#)
- ☐ [Plastic Bottles - Europe](#)
- ☐ [Plastic Caps & Closures - Europe](#)
- ☐ [Plastic Caps & Closures - World](#)
- ☐ [Plastic Containers - World](#)

- ☐ [Plastic Films - World](#)
- ☐ [Rigid Metal Packaging - Europe](#)

### Industry

- ☐ [Adhesives - Europe \(2<sup>nd</sup> ed.\)](#)
- ☐ [Adhesives - World \(2<sup>nd</sup> ed.\)](#)
- ☐ [Bitumen - Europe](#)
- ☐ [Doors & Windows - Europe](#)
- ☐ [Insulation Material - Europe](#)
- ☐ [Paints & Varnishes - Eur. \(2<sup>nd</sup> ed.\)](#)
- ☐ [Paints & Varnishes - World](#)
- ☐ [Pipes - Europe](#)
- ☐ [Plastic Pipes - Europe \(2<sup>nd</sup> ed.\)](#)
- ☐ [Plastic Pipes - World](#)
- ☐ [Printing Inks - World](#)

### Agriculture

- ☐ [Ammonia - World](#)
- ☐ [Crop Protection - World](#)
- ☐ [Fertilizers - Europe \(2<sup>nd</sup> ed.\)](#)
- ☐ [Fertilizers - World](#)
- ☐ [Urea - World](#)

### Value Chains

- ☐ [Ethylene Value Chain - China](#)
- ☐ [Ethylene Value Chain - USA](#)
- ☐ [Propylene Value Chain - China](#)
- ☐ [Propylene Value Chain - USA](#)

**2) Language** ☐ German ☐ English ☐ Please send us **free reading samples** first

### 3) Edition (Content is identical)

	Prices
<input type="checkbox"/> <b>Basic</b> (= book) for one site	€2,500
<input type="checkbox"/> <b>Premium</b> (= PDF-file + book) for one site	€3,700
<input type="checkbox"/> <b>Corporate</b> (= printable PDF-file) for all sites	€5,600
<input type="checkbox"/> all data in xls (available with Corporate) for all sites	€750
___ additional book(s) for licensed site	€300

**When ordering**  
**2 studies: 10% discount**  
**3 studies: 20% discount**

**Promotion Code:** \_\_\_\_\_

Upon receiving your order we will send the invoice immediately. PDF-files can be sent by email.  
Prices include shipping. (Customers from Germany: plus 19% VAT.) Our GTC apply.

If paying by **credit card**, please fill out the following:

Card Number: \_\_\_\_\_ Expiry date: \_\_\_\_\_ / \_\_\_\_\_



### 4) Contact Details

Title/ Name \_\_\_\_\_

Company \_\_\_\_\_

Department \_\_\_\_\_

Address \_\_\_\_\_

Email \_\_\_\_\_

Tel. \_\_\_\_\_

### 5) Order by

**Tel** +49 7531 94293 0

**Fax** +49 7531 94293 27

**Email** [order@ceresana.com](mailto:order@ceresana.com)

**Web** [www.ceresana.com/en](http://www.ceresana.com/en)

**Post** Ceresana  
Technologiezentrum  
78462 Constance  
Germany