The economic and social relevance of the fibre-based packaging industry in Europe

March 2026 | Report prepared for Fibre Packaging Europe

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The Smithers methodology deploys a combination of primary and secondary research to address the current client concerns

Internal Data

Desk Research

A review of published material on the trends and market forces within the industry and the likely impact on the market. This includes sources such as industry/trade associations, global databases, company reports, etc.

Delphi Technique

Smithers' RADAR (Research, Analysis, Development and Review) unit, consisting of the necessary experts (across fields), will moderate the research findings to ensure the highest possible degree of accuracy

Primary Research

This includes conversations with key players across the supply chain company representatives and executives, and inputs from our in-house network of experts.

Final Analysis

FPE needs robust and independent data on the economic and social relevance of the fibre-based packaging industry

Fibre Packaging Europe (FPE) is an informal coalition of seven trade associations representing industries involved in forestry, pulp, paper, board and carton production and recycling from across Europe.

To assist FPE and the whole packaging paper and board value chain’s advocacy and overall communication, an independent market assessment of the economic and social relevance of fibre-based packaging is necessary.

The objectives of this market assessment are to develop a high-level report suitable for advocacy use on the economic and social relevance of the fibre-based packaging industry including:

- Mapping the value chain from raw material to final product
- Economic indicators including revenue, added value and share of the European manufacturing industry and GDP
- Social indicators including jobs, number of companies and share of European manufacturing industry jobs
- Full supporting background direct and indirect data in excel along with detailed methodology, sources and references

The project scope covers key geographies, segments and economic / social indicators

Geography: Europe is defined as EU27+3

- EU 27
- UK
- Norway
- Switzerland

Segments

- Corrugated Cardboard
- Folding Cartons
- Flexible Paper
- Sack and Kraft
- Moulded Fibre
- Liquid Packaging

Key Indicators

Economic indicators

- revenue
- added value
- share of European manufacturing industry
- share of European GDP

Social indicators

- jobs
- number of companies
- share of European manufacturing jobs

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Product segment descriptions are outlined below, with more detailed definitions available in the appendix

Corrugated Cardboard

Corrugated cardboard, is a strong, lightweight packaging material used for rigid boxes in transport and consumer packaging

Folding Cartons

Cartons made from paperboard or cardboard, which are supplied to customers in a flat or glued and folded format and are then assembled

Kraft Paper Sacks and Bags

Packaging used to make heavy duty sacks or smaller paper bags, the latter for carrying or containing small quantities of goods

Flexible Paper Packaging

Lightweight fibre-based flexible paper packaging that bends and wraps easily around products

Moulded Fibre

Packaging made from recycled paper, wood fibres, or plant waste, moulded into 3D shapes like egg cartons

Liquid Packaging Carton

The liquid packaging segment covers the value chain from LPB production to LPC conversion into finished liquid cartons.

Economic and social key indicator descriptions are outlined below, to provide additional clarity on these measures

Is the total amount of revenue a business generates from selling its products or services to other companies during a 12-month period

The number of employment positions sustained directly or indirectly through fibre-based packaging activities – relates only to those areas specified in the value chain on p8

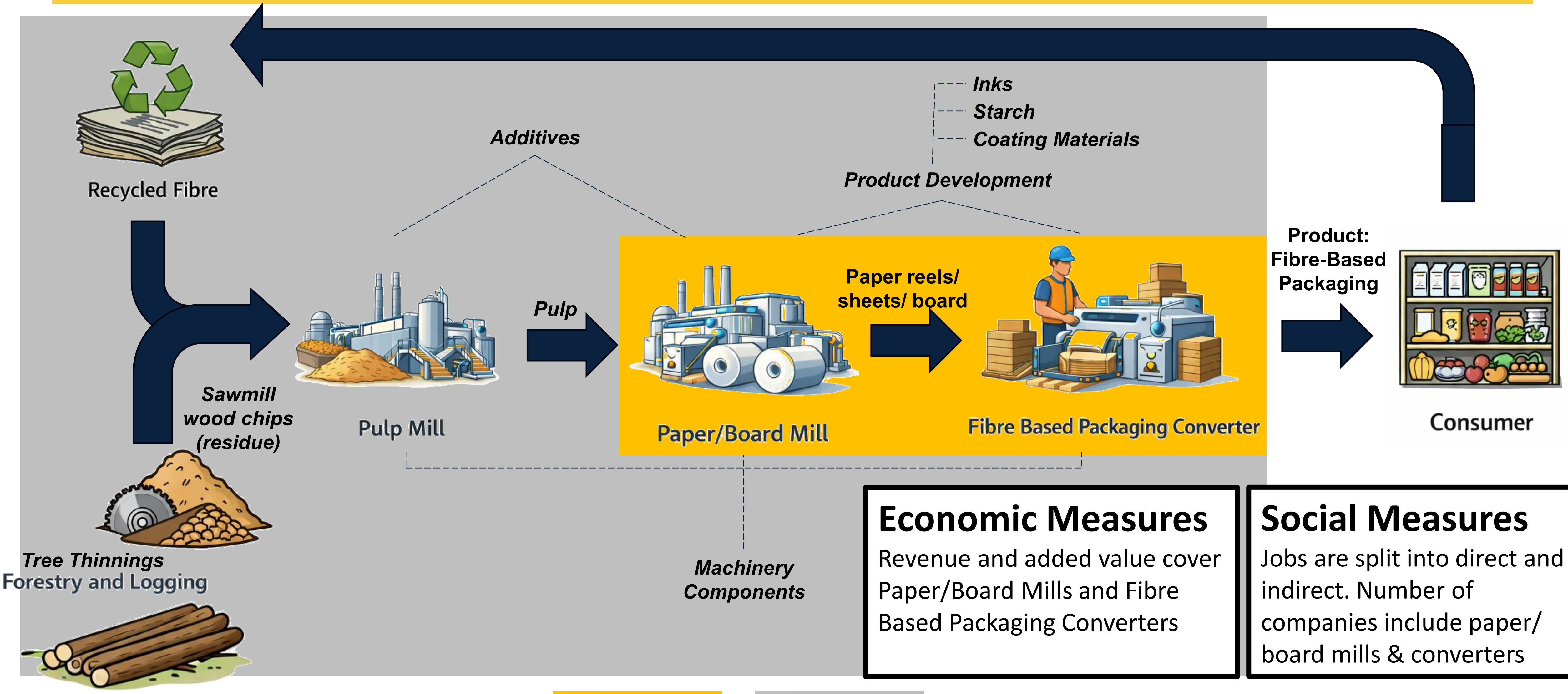
Added value at factor cost is the gross income from operating activities after adjusting for operating subsidies and indirect taxes.[1] It is a key economic indicator used to measure the industry's contribution to the economy and is calculated as the total value of production minus the cost of goods and services purchased

The number of companies involved directly or indirectly in fibre-based packaging activities – relates only to those areas specified in the value chain on p8

In the value chain on p8, ‘direct’ covers fibre-based converters and paper/board mills, with ‘indirect’ all areas feeding into these entities including forestry/logging and sawmills

[1] *Cepi-Definitions-and-Concepts_2021-compressed*

The fibre-based packaging value chain encapsulates key users and inputs from raw material to final product



Economic Measures

Revenue and added value cover Paper/Board Mills and Fibre Based Packaging Converters

Social Measures

Jobs are split into direct and indirect. Number of companies include paper/ board mills & converters

Direct | Indirect

Fibre-based packaging generates €110 billion in revenue, €26 billion in added value and supports 710,000 jobs. It is a cornerstone of European competitiveness, growth, employment and social stability especially in rural areas

Revenue

€110.4

billion in annual sales across EU27+3

Employment

710,000

Direct and indirect jobs supported

Added Value

€26.0

billion in added value

Share of EU27+3 Manufacturing Jobs

2.1%

around 1 in 50 manufacturing jobs

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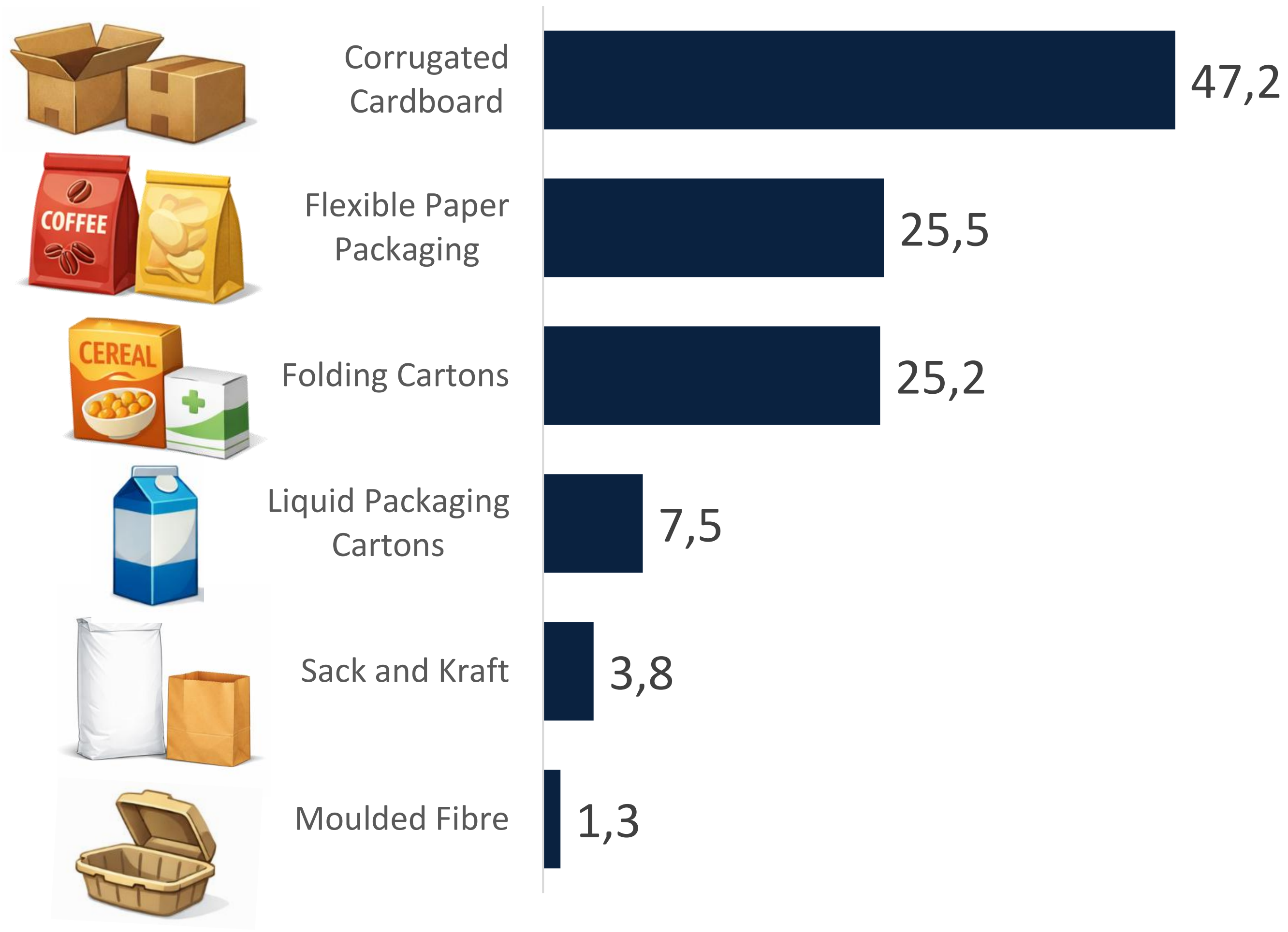
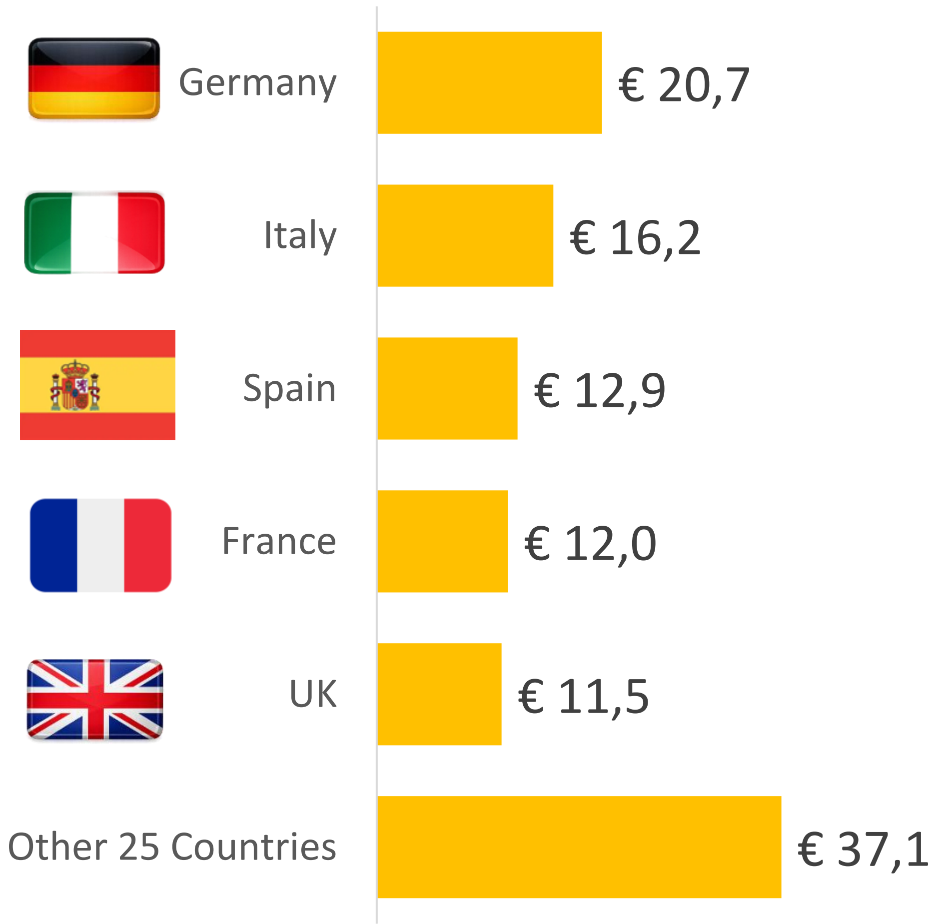
Collectively the 6 product segments generate €110 billion of revenue across 30 countries

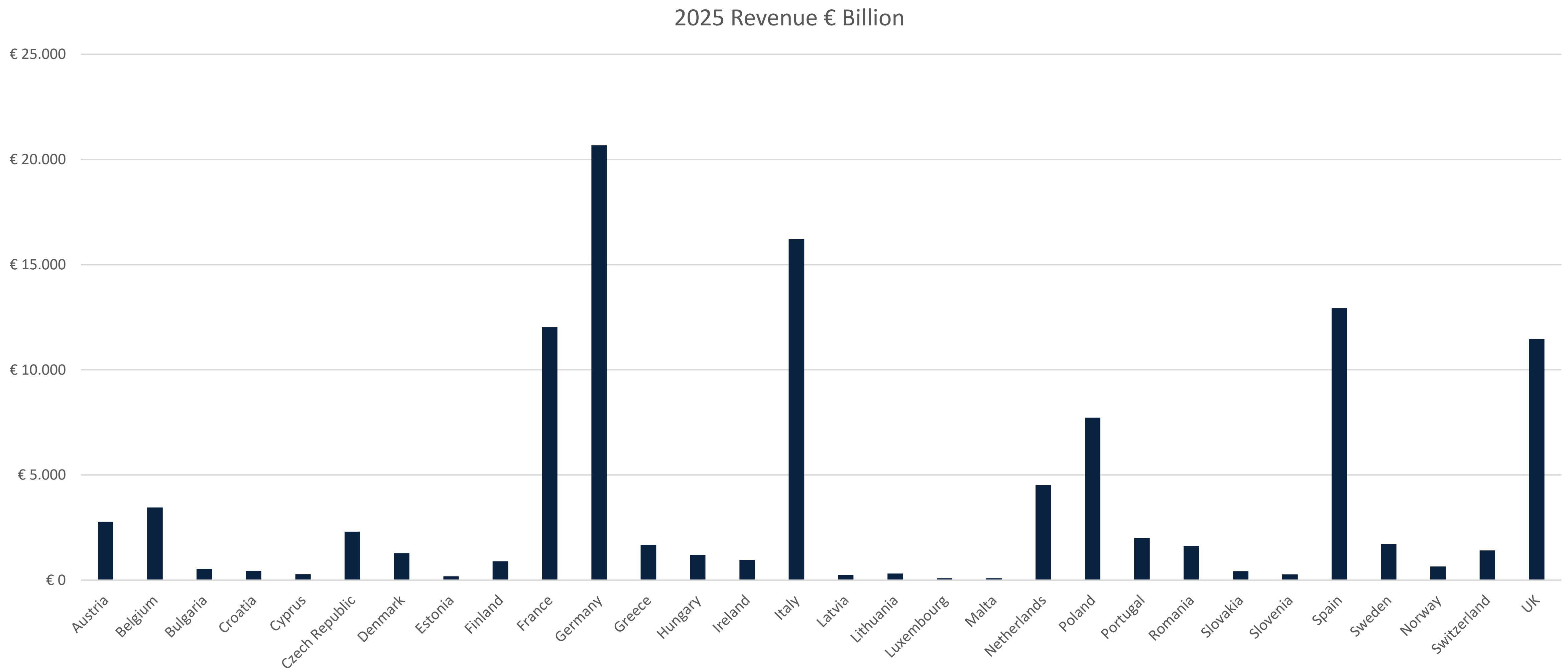


€ Billions



€ Billions

Country Level Detail for Fibre-Based Packaging Revenue



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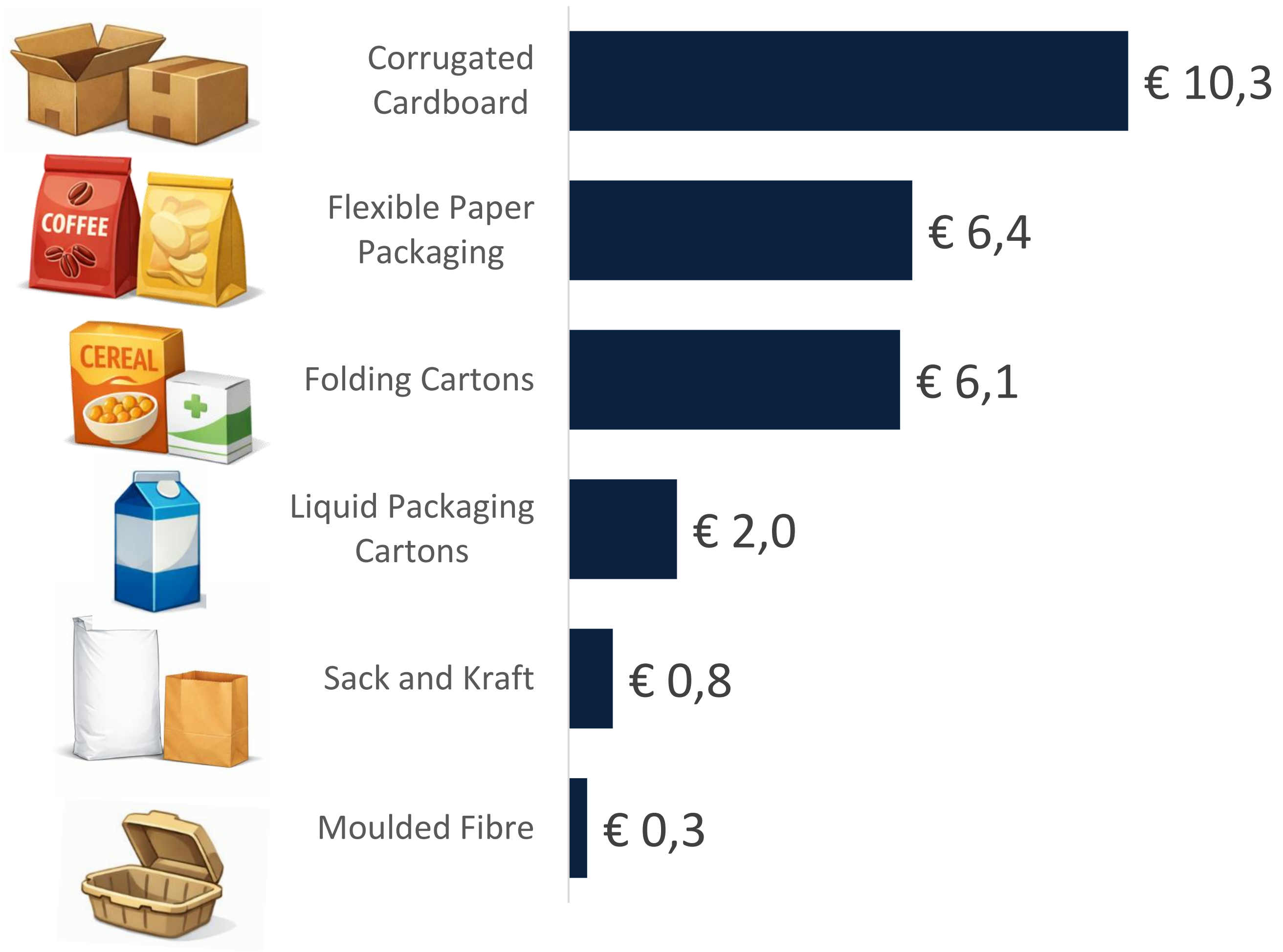
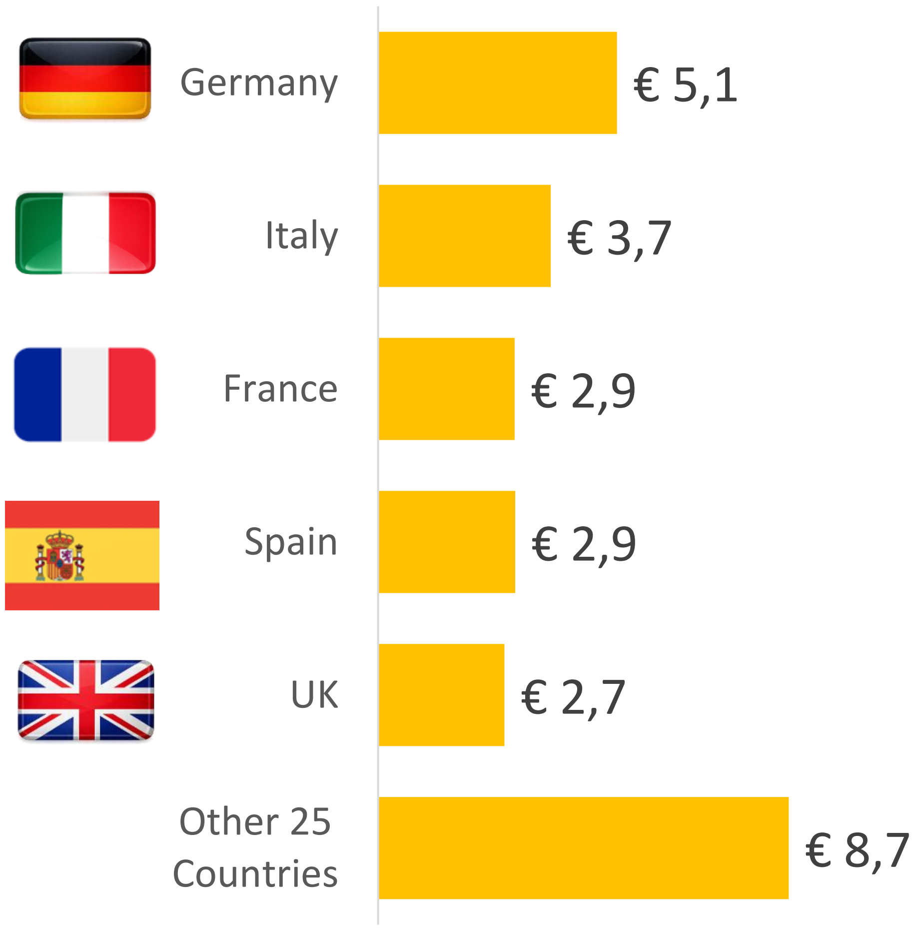
The sector creates €26.0 billion of added value defined as the gross income from operating activities after adjusting for operating subsidies and indirect taxes

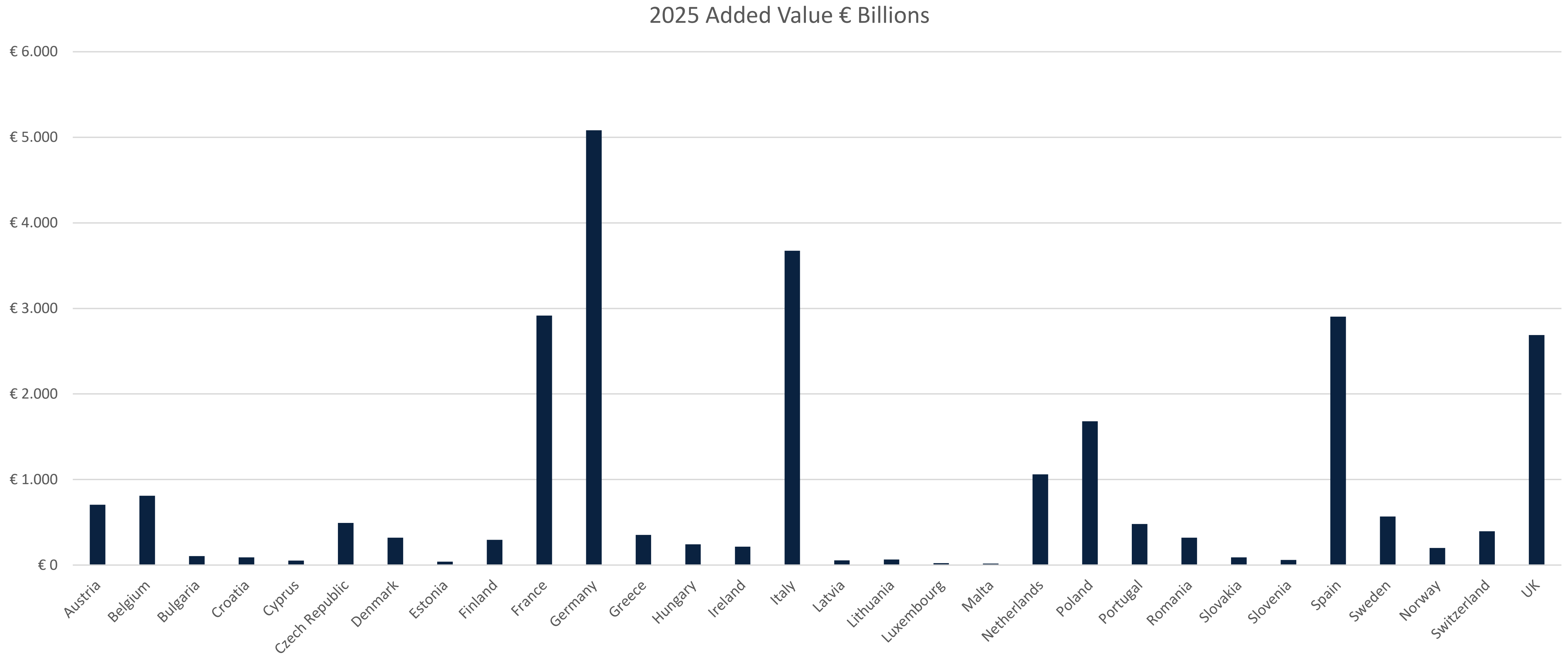


€ Billions



€ Billions

Country Level Detail for Fibre-Based Packaging Added Value



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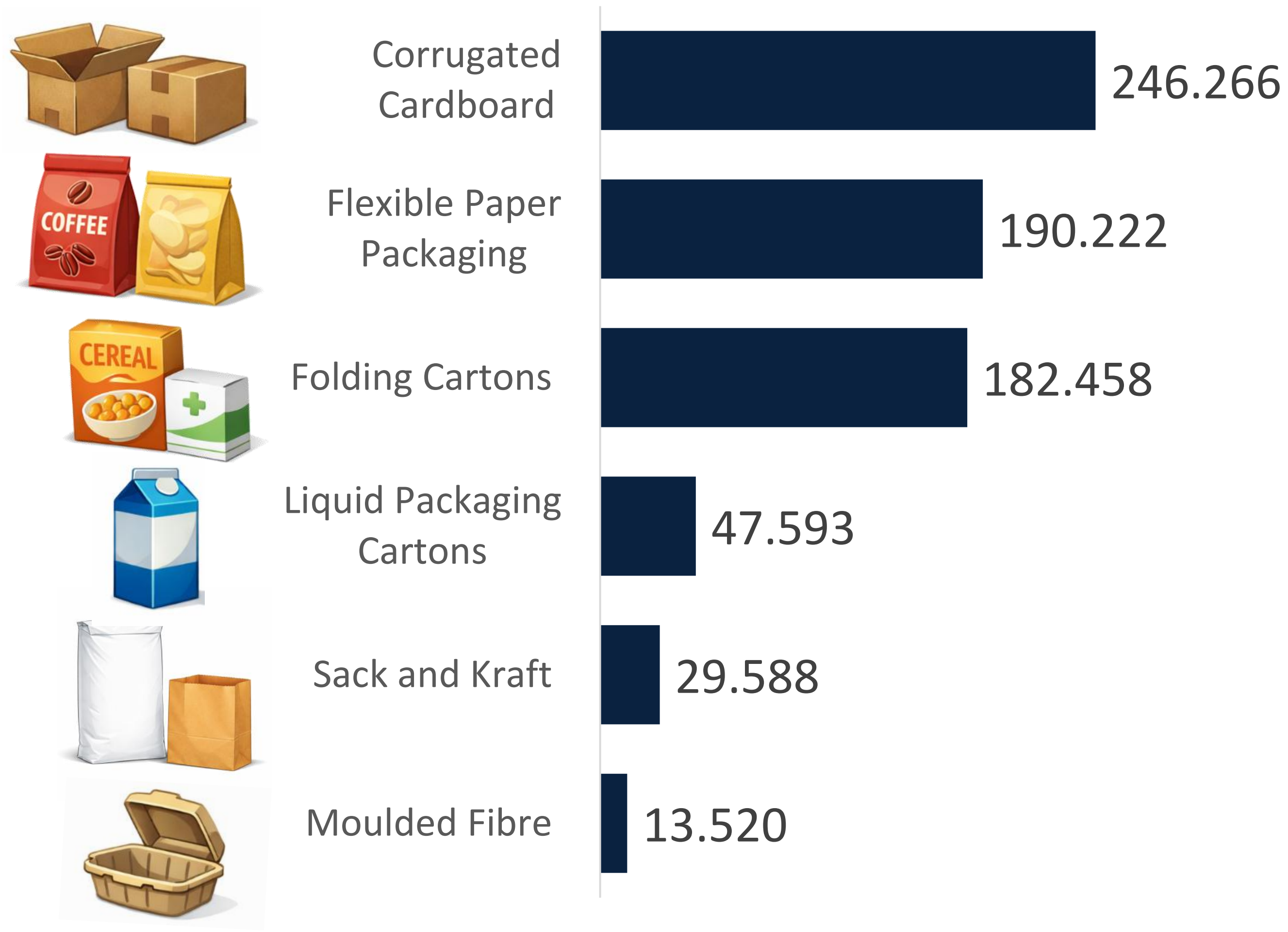
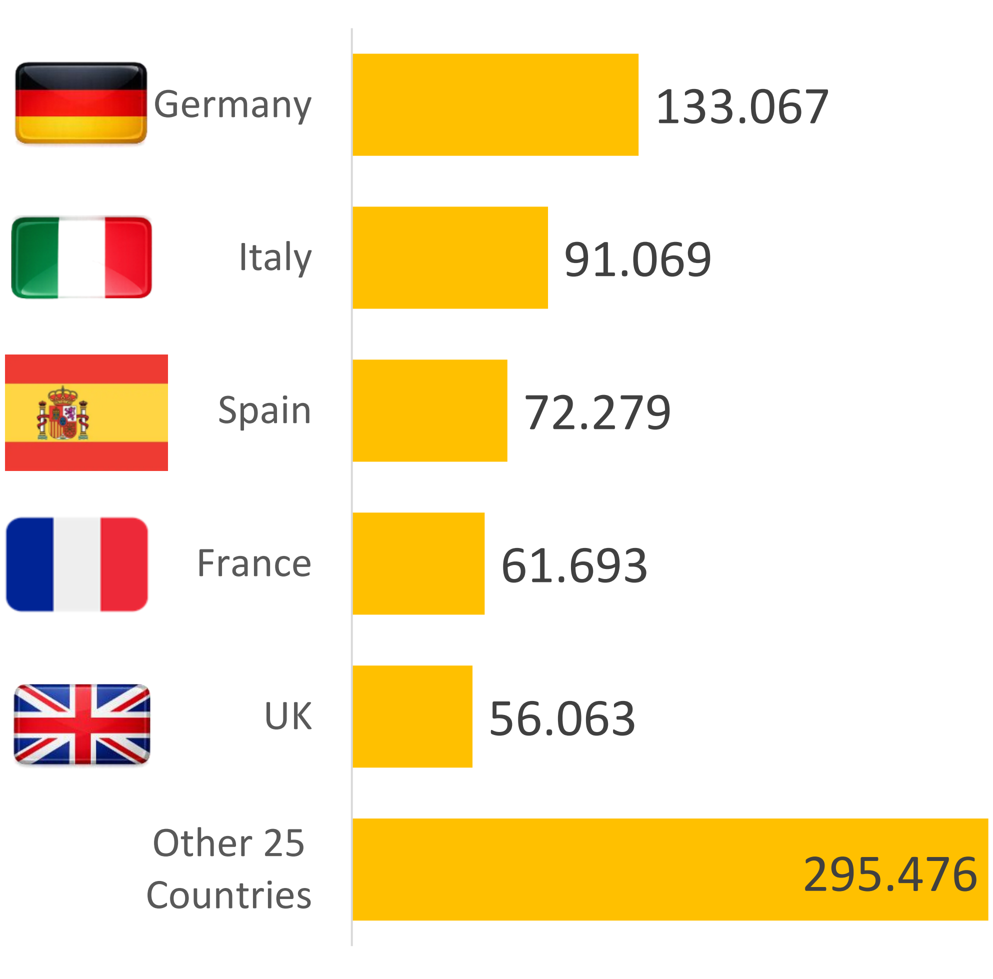
The sector supports 710,000 jobs strengthening community stability and resilience, given the wide geographic dispersion of manufacturing sites across Europe





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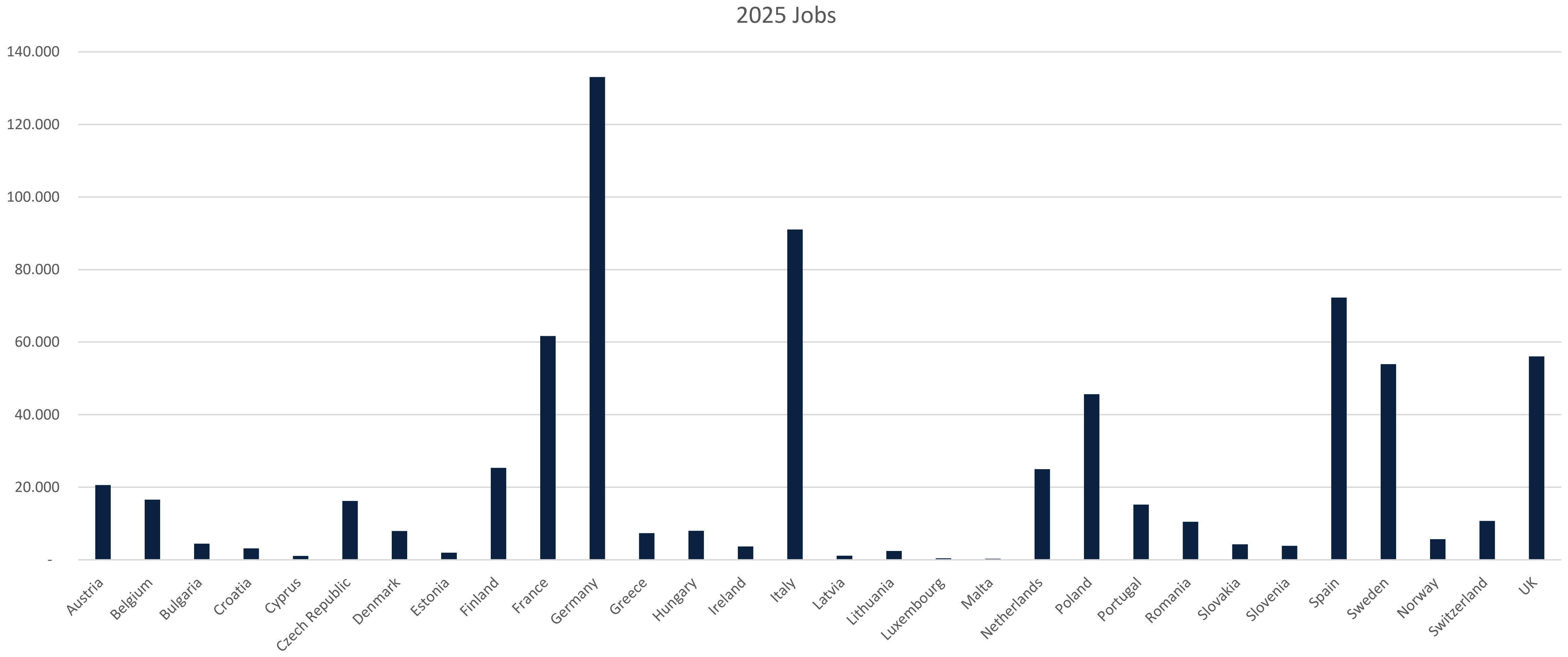
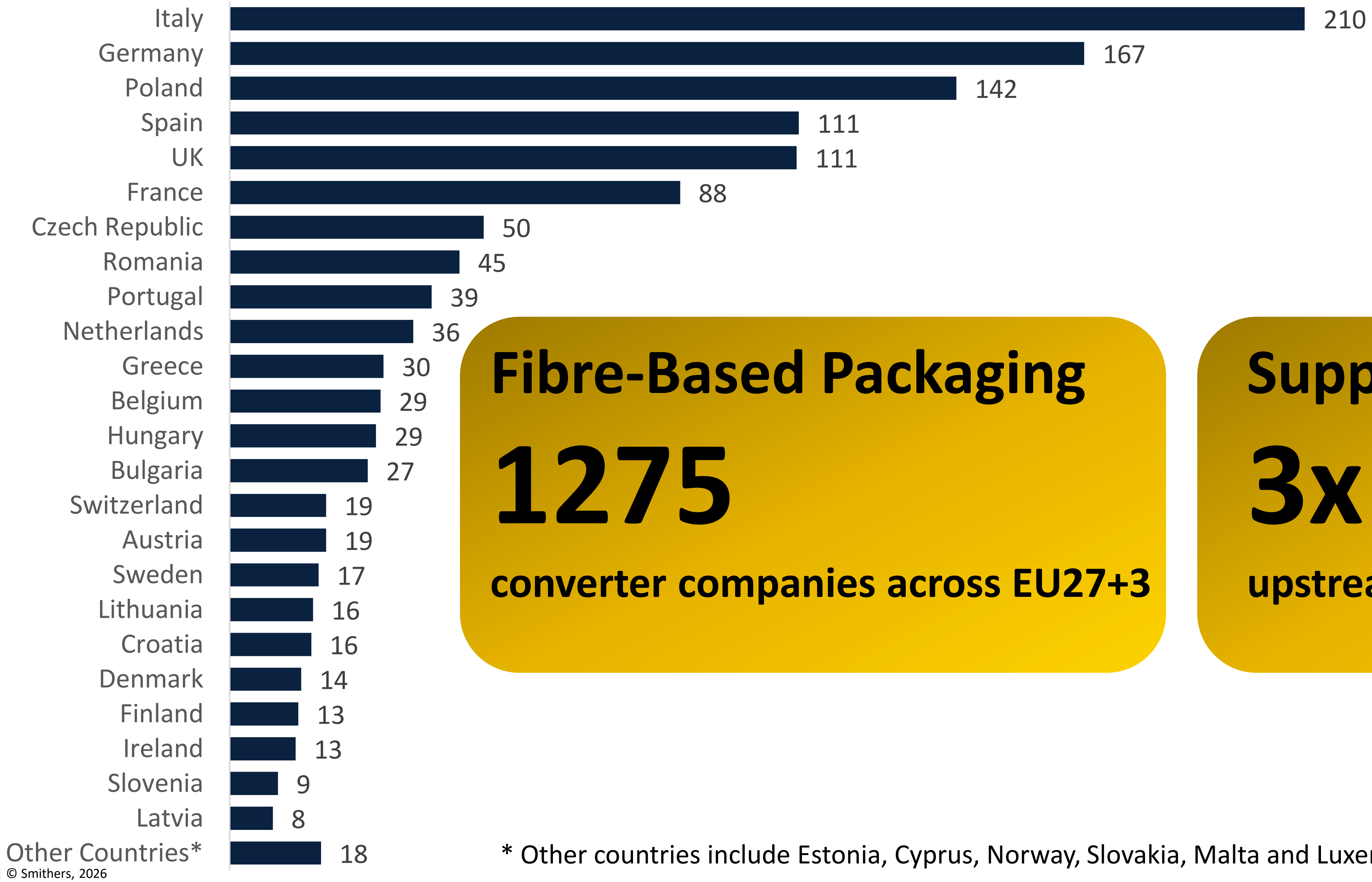
Country Level Detail Fibre-Based Packaging Jobs



There are 1,275 fibre-based converter companies across the EU27 + 3, who help support upstream companies by a ratio of 1:3



Fibre-Based Packaging

1275

converter companies across EU27+3

Support

3x more

upstream companies

* Other countries include Estonia, Cyprus, Norway, Slovakia, Malta and Luxembourg

Packaging supports many of Europe's largest and most important downstream industries, which together generate €15 trillion in revenue and 43 million jobs

Sector	Definition	Revenue	Employment
Food	Fresh, frozen, chilled, dried & canned food; ready meals; baked goods; dairy; confectionery; sauces; baby food; pet food and hot beverages.	€1,200 bn	4m
Beverage	Soft drinks (water, carbonated, juice, sports & energy drinks, RTD tea/coffee) and alcoholic drinks (beer, cider, wine, spirits, FABs).	€300bn	600k
Healthcare	Pharmaceuticals, vaccines, vitamins, wound care, sports nutrition, medical devices and other healthcare products.	€610bn	1.8m
Cosmetics	Fragrances, colour cosmetics, skin care, sun care, hair care, bath & shower, antiperspirants, oral care and associated gift sets.	€104bn	270k
Other Consumer applications	Household care; tobacco; sports goods; toys & games; entertainment media; textiles; clothing; domestic appliances; DIY and other non-food consumer goods.	€550bn	2.5m
Industrial applications	All other industries that require packaging in the form of drums, IBCs, sacks, pails & crates for industrial/bulk use; packaging for goods, parts & ingredients; tertiary corrugated and other industrial transit formats.	€12,300bn	33.6m
	Totals:	€15,064bn	42.8m

indicative estimates based on Eurostat and Smithers estimates

Appendix

Segment definitions

Pack Type	Definition and Key Characteristics
Corrugated	Corrugated board, also known as corrugated packaging or corrugated cardboard, is a strong, lightweight packaging material used for rigid boxes and in transport and consumer packaging.
	It's a multilayer glued assembly of fluted paper and linerboard. The most common form has at least three layers: two flat boards (liners) and an inner layer of 'waved' board (fluting).
	The wavy layer creates air pockets for cushioning. These layers are glued together, traditionally using starch adhesive. A single-face web is formed by gluing the fluting to one liner. For greater strength, multiple liners separated by fluting can be combined. The specific paperboard for this construction is called Containerboard or CCM (corrugated case material).
Folding Cartons	These are boxes made from paperboard or cardboard that typically measure 0.3 mm or greater in thickness. They are manufactured through several industrial processes including sizing, punching/cutting openings, creasing along fold lines, and printing or finishing. Folding cartons are supplied to the user in a flat or glued and folded format and are then assembled.
Flexible Paper Packaging	This category encompasses pulp based substrates that are soft and easily manipulated to wrap around articles and conform to their shape. It includes varieties like greaseproof paper and calendered paper for high-quality surface printing. Flexible Paper Packaging is generally the lightest of all fibre-based packaging materials, with standard wrapping paper is often around 30 gsm .
Sack kraft and Bag kraft paper	Bag kraft: converted packaging product, typically made from one kraft paper layer of less than 80 gsm, with or without handle, suitable for carrying or containing small quantities of goods
	Sack kraft paper: converted packaging product used in the manufacture of heavy-duty sacks, made with one or more plies, typically weighing more than 80 gsm, suitable for packaging large quantities of powdery or granulate products that demand strength and durability.
Moulded Fibre	Also known as moulded pulp, this packaging is produced from natural cellulosic or lignocellulosic fibres. Source materials can include wood, recycled fibres, or agricultural biomass waste like bagasse, bamboo, or wheat straw. This material is generally produced using wet moulding processes (which include heavy-wall, transfer, thermoformed, and processed types) into specific three-dimensional forms.
Liquid Packaging Cartons	The liquid packaging segment covers the value chain from LPB production to LPC conversion into finished liquid cartons.

Sources / References

Sources / References – Revenue

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- *Smithers: The Future of Folding Cartons to 2030*
- *Smithers: The Future of Global Flexible Packaging to 2028*
- *Smithers: The Future of Sack and Kraft Paper to 2027*
- *Smithers: The Future of Moulded Pulp Packaging to 2030*
- *Smithers: The Future of Liquid Paperboard to 2028*
- *Ecma: European Carton Prospects 2025*
- *Fefco: Annual Statistics 2024*
- *Cepi-Definitions-and-Concepts_2021-compressed*
- *Eurostat*

Sources / References – Value Added

- *Cepi-Definitions-and-Concepts_2021-compressed*
- *Eurostat*

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Sources / References

Sources / References – Jobs Supported

- *Austropapier: Annual Report 2024*
- *Cepi: Key Statistics 2024*
- *Fefco: Annual Statistics 2024*
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- *The European Moulded Pulp Producers Association – EMPPA: Members List 2026*
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Sources / References – No. Of Companies Supported

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