



FEFPEB statistics 2020 - report

Date 9 July 2021

RESPONSE TO THE SURVEY

18 FEFPEB full members were invited to respond to this survey, regarding the year 2019 and including pallets, Industrial packaging and light-weight packaging.

Some individual company members were unable to react for their national market, as there is no national trade association.

Also some full members had to restrict their response to the pallet section of our industry.

The overview contains a breakdown of the received data, as well as the missing or incomplete elements.

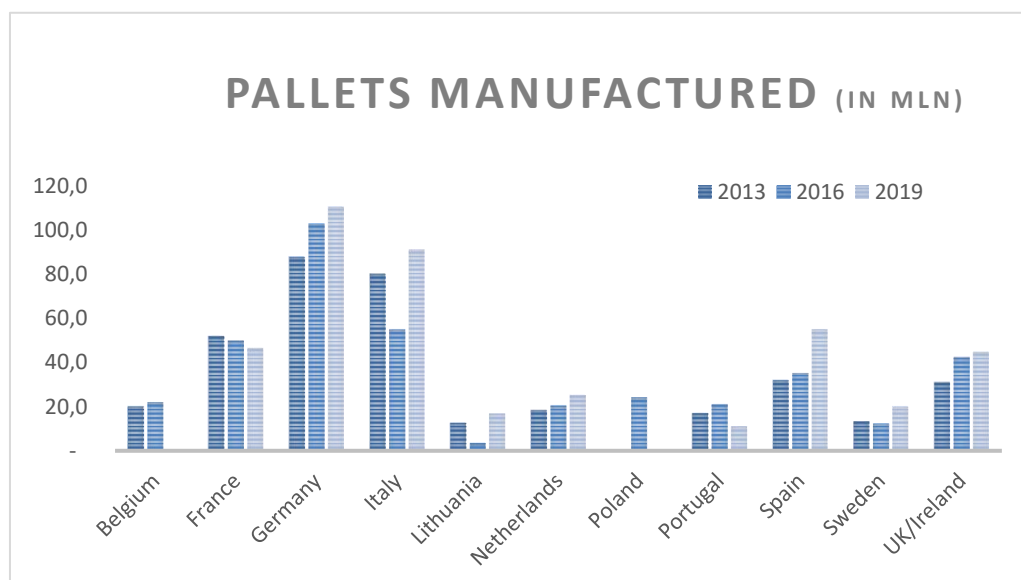
	Pallets	IP	LWP
France	Yes	No	Yes
Germany	Yes	Yes	Yes
Italy	Yes	Yes	Yes
Lithuania	Yes	Yes	No
Netherlands	Yes	Yes	No
Portugal	Yes	Yes	Yes
Spain	Yes	Yes	Yes
UK/Ireland	Yes	Yes	No
Sweden	Yes	No	No

Missing or incomplete datapoints:		
Austria	Czech republic	Latvia
Denmark	Hungary	Belgium
Switzerland	Turkey	Poland

PALLETS MANUFACTURED AND REPAIRED

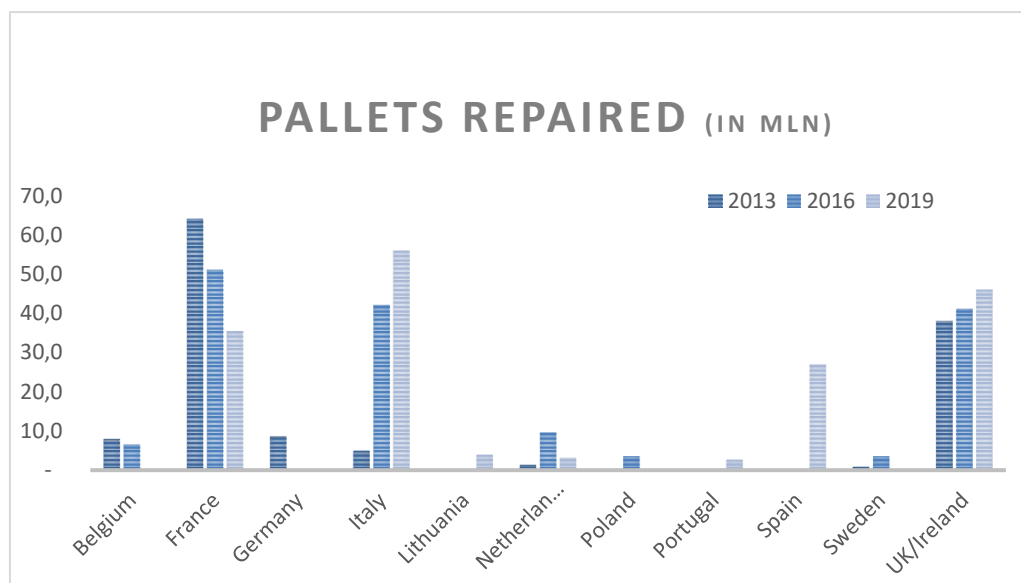
Of these reporting countries, we can analyse how many new units were manufactured within the participating markets in 2019. These datapoints are then presented in reference to the 2016 and 2013 reports, and take note of a steady increasement of new units manufactured.

Production	2013	2016	2019
Belgium	20,0	22,0	-
France	52,0	50,0	46,5
Germany	87,7	103,0	110,5
Italy	80,0	55,0	91,0
Lithuania	12,7	3,5	16,9
Netherlands	18,5	20,5	25,2
Poland	-	24,2	-
Portugal	17,0	21,0	11,0
Spain ¹	31,9	35,2	55,0
Sweden	13,4	12,4	20,0
UK/Ireland	31,0	42,5	44,8
TOTAL	364,2	389,3	435,9
DIF:	-	+7%	+12%



A representation of repaired units can also be provided, although it should be noted that these numbers are reported with more variation, and less consistency than the manufactured units.

Production	2013	2016	2019
Belgium	8,0	6,6	-
France	64,0	51,0	35,5
Germany	8,7	-	-
Italy	5,0	42,0	56,0
Lithuania	-	0,3	4,0
Netherlands	1,4	9,7	3,3
Poland	-	3,6	-
Portugal	-	-	2,7
Spain	-	-	27,0
Sweden	1,0	3,6	-
UK/Ireland	38,0	41,0	46,0
TOTAL	126,1	157,8	197,5
DIF:	-	+25%	+25%



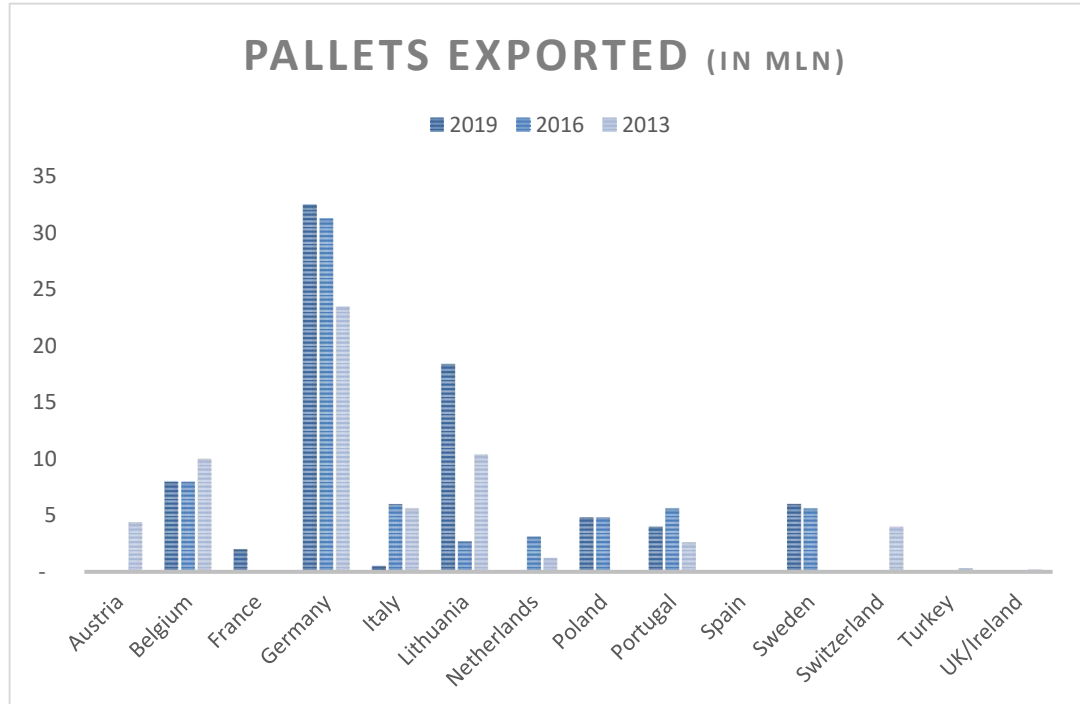
We can draw preliminary conclusions based on these numbers stating that the repair market is increasing in size. It must also be noted that the repair market is insufficiently reported upon. In the future, the pallet pool organisations will report there repaired numbers to FEFPEB, which will then be included in the report.

¹ Spain data 2013/2016 consisted of member companies only. 2019 consists of total market figures

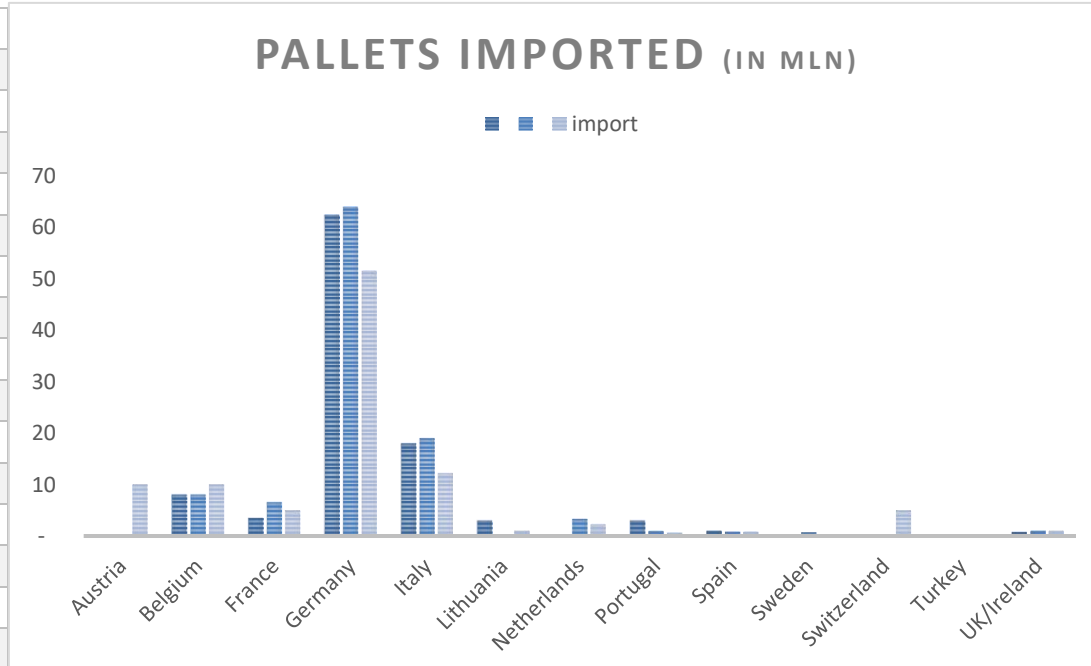
PALLETS EXPORTED AND IMPORTED

Of these reporting countries, we can analyse how many units were exported and imported in the participating markets in 2019. These datapoints are presented in reference to the 2016 and 2013 reports, and take note of a steady increasement of cross border activities.

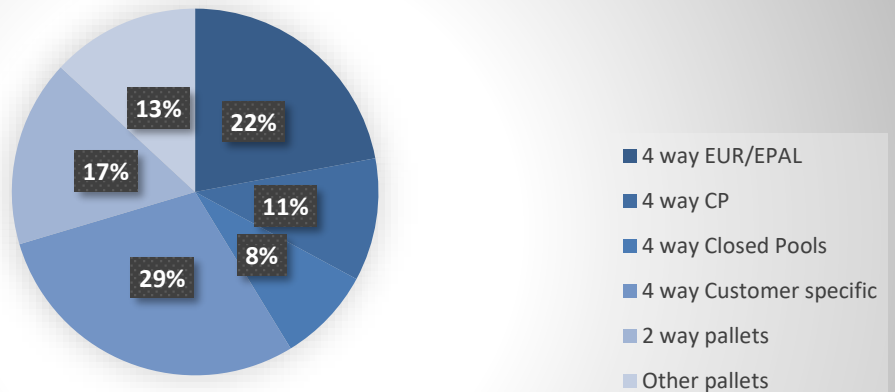
Exported	2013	2016	2019
Austria	4,4		
Belgium	10,0	8,0	8,0
France			2,0
Germany	23,5	31,3	32,5
Italy	5,6	6,0	0,5
Lithuania	10,4	2,7	18,1
Netherlands	1,2	3,1	
Poland		4,8	4,8
Portugal	2,6	5,6	4,0
Spain			50,0
Sweden		5,6	6,0
Switzerland	4,0		
Turkey	0,3		
UK/Ireland	0,2	0,05	0,05
TOTAL	62	67	126
DIF:	-	+8%	+88%



Imported	2013	2016	2019
Austria	10,0		
Belgium	10,0	8,0	8,0
France	5,0	6,5	3,5
Germany	51,6	63,9	62,5
Italy	12,2	19,0	18,0
Lithuania	1,0	-	3,0
Netherlands	2,2	3,3	-
Portugal	0,6	0,9	3,0
Spain	0,8	0,8	1,0
Sweden	-	0,7	-
Switzerland	5,0	-	-
Turkey	0,1	-	-
UK/Ireland	1,0	1,0	0,75
TOTAL	100	104	134
DIF:	-	+5%	+28%



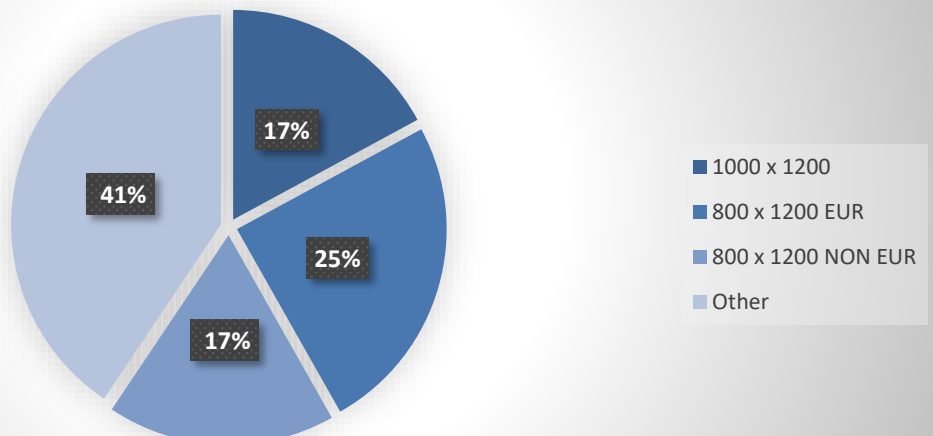
BREAKDOWN OF VOLUMES SPECIFIED



MANUFACTURED VOLUMES SPECIFIED

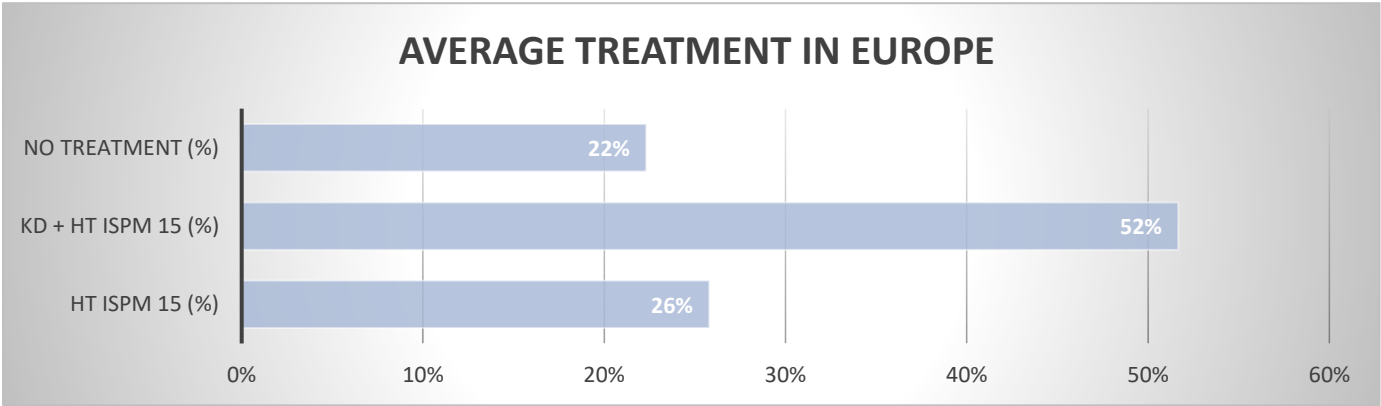
Manufactured volume specified 2019						
	4 way / block pallets				other pallets	
	EUR / EPAL	CP	Closed pools	Customer specific	2 way pallets	other pallets
Belgium	2.164.715	59.103	-	-	-	-
France	3.100.000	2.300.000	5.500.000	28.700.000	6.900.000	-
Germany	28.000.000	12.000.000	-	-	-	-
Italy	6.785.228	-	-	-	-	-
Lithuania	1.000.000	-	-	-	-	3.600.000
Netherlands	1.700.000	2.200.000	700.000	16.600.000	2.400.000	1.600.000
Poland	-	-	-	-	-	-
Portugal	879.424	120.000	3.071.274	3.073.713	150.125	3.442.926
Spain	7.500.000	4.000.000	10.000.000	3.500.000	11.000.000	19.000.000
Sweden	-	-	-	-	-	-
UK/Ireland	800.000	4.800.000	500.000	16.700.000	18.400.000	3.200.000
SUM	51.929.367	25.479.103	24.771.274	68.573.713	40.850.125	38.842.926
Average	21%	10%	10%	27%	16%	16%

DIMENSIONS OF PALLETS SPECIFIED

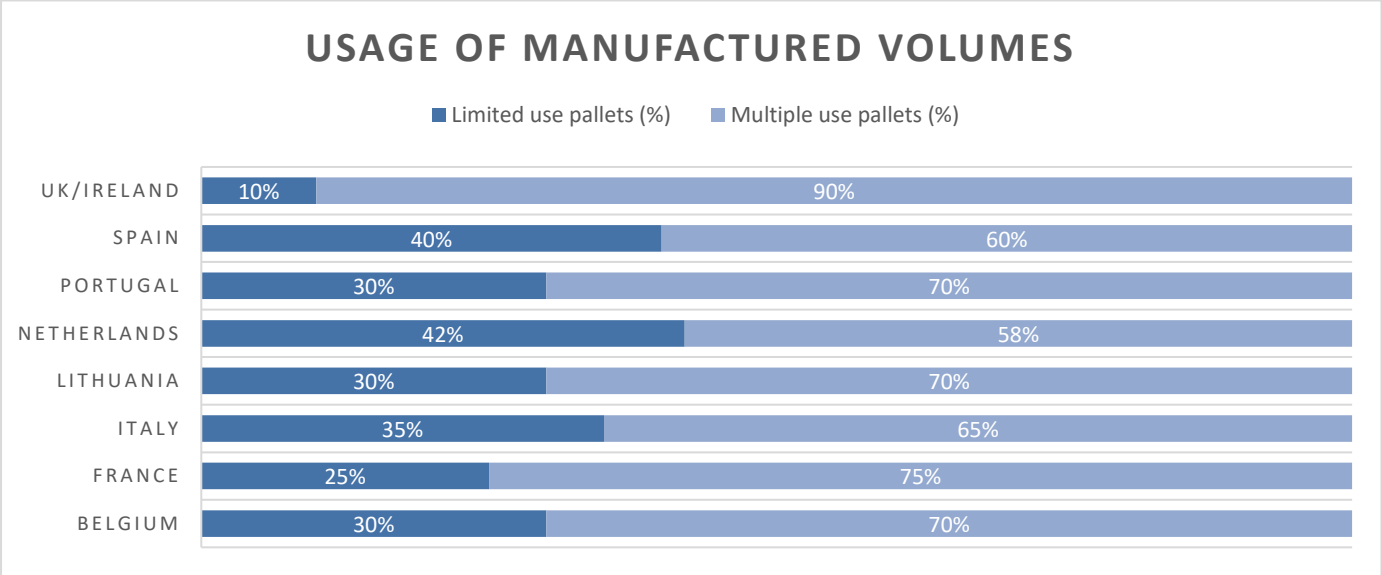


VOLUMES RELATED TO TREATMENTS AND USAGE

Of these reporting countries, we can review the treatments applied to the wooden packaging material and compare to previous years. It can be noted that the KD+HT ISPM 15 method gained popularity as we noted a 45% average over the reporting year of 2016. This difference was gained from what was previously noted as HT ISPM 15 treated materials.



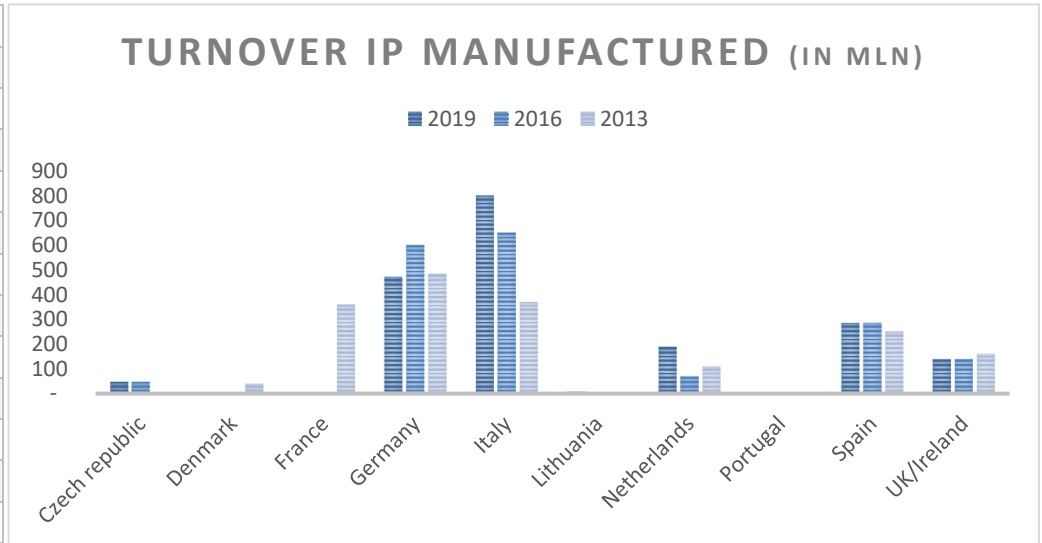
Of the reporting countries, we can take note of the limited use, or multiple use of pallets. It's worth mentioning that all pallets are reusable, unless it concerns packaging that is intended to be deployed only once before it enters the waste phase. We noticed a large increasement of what is reported as multiple use on the European market. These numbers were averaging around 50-50 in 2013.



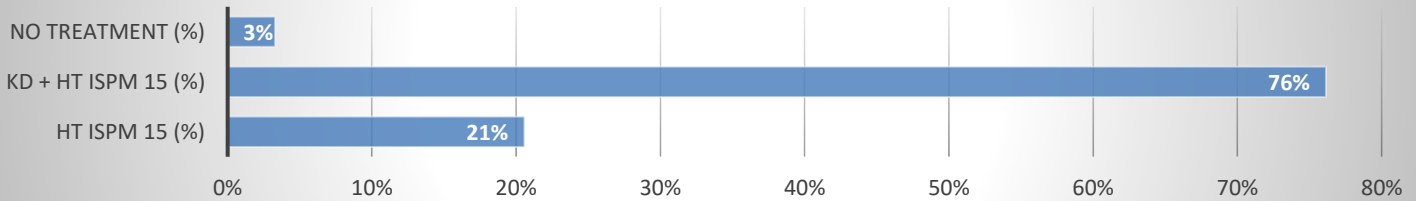
INDUSTRIAL PACKAGING TURNOVER COMPARISON

Of these reporting countries, we can also distil how much the Industrial Packaging section produced. The results are more difficult to display since units produced are hardly standardised. Therefore the annual turnover of the market is measured. The results compared between 2019, 2016 and 2013 can be reviewed below. A steady increasement can be noted in total addressable market. Below that graph we can note that the average treatment is almost completely aligned with ISPM 15, as 3% is reported to have no treatment whatsoever.

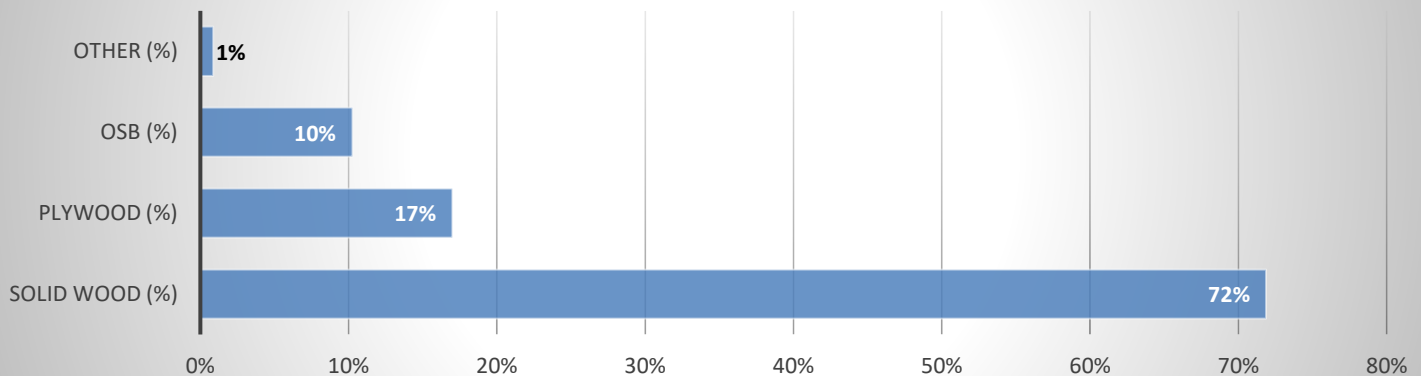
Turnover	2013	2016	2019
Czech	-	48	48
Denmark	40	-	-
France	359	-	-
Germany	483	600	472
Italy	370	650	800
Lithuania	-	-	8
Netherlands	110	70	190
Portugal	-	-	3
Spain	250	285	285
UK/Ireland	160	140	140
TOTAL	1.772	1.793	1.946
DIF:	-	+1%	+8,5%



AVERAGE TREATMENT IN EUROPE



AVERAGE MATERIALS USED FOR IP IN EUROPE



LIGHT WEIGHT PACKAGING

Country	Manufactured units 2019	Manufactured units 2016	Trend
Germany	20.000.000	22.000.000	- 9 %
Italy	250.000.000	400.000.000	- 37%
Portugal	190.000.000	-	-
Spain	559.811.111	499.853.901	+ 12 %
France	1.100.000.000	945.000.000	+ 16 %
SUM:	2.119.811.111	1.866.853.901	+ 14 %

Of the lightweight packaging section we can report that the total manufactured market increased by 14% between 2016 and 2019. Most notable where the 1 billion units produced in France. This is related to the small packaging, such as cheese boxes, which are specific to the market.

OVERVIEW OF THE EUROPEAN EFFORTS ON PACKAGING WASTE

The European Union rules on packaging and packaging waste to cover both the production, design and waste management of all packaging materials and aim to deal with the increasing quantities of waste which cause environmental problems. This means all materials, and packaging including industrial, commercial, household and other sectors. They also aim to remove barriers in the internal EU market, caused by EU countries adopting different rules on packaging design.

Although the EU considers the implementation of these rules to be a success, they note the amount of packaging waste in the EU is still increasing, and that too many of our finite resources are being wasted without being recirculated into the economy.

The EU has revised and amended its laws on packaging several times. It is with this in mind that FEFPEB seeks to create a representative European market overview from which it can initiate further endeavours to inform and assist policy makers in Brussels to harmonise the implementation, and set realistic industry targets for recycling which include repair for reuse calculations.

The latest amendment to the Directive contains updated measures to prevent the production of packaging waste and promote the reuse, recycling and other forms of recovering of waste, instead of its final disposal. Among other rules, by end of 2024, EU countries should ensure that producer responsibility schemes are established for all packaging. The Directive also sets the following specific targets for recycling on all packaging and specific materials.

	Current targets (%)²	By 2025 (%)	By 2030 (%)
All packaging	55	65	70
Wood	15	25	30
Plastic	25	50	55
Ferrous metals	50 (incl. Al)	70	80
Aluminium	-	50	60
Glass	60	70	75
Paper and cardboard	60	75	85

² Current targets are set by the European Commission and can be accessed online:

https://ec.europa.eu/environment/topics/waste-and-recycling/packaging-waste_nl