Market evolution: Paperboard packing containers (CN 4819) — 2015–2025

Introduction

This report examines the extra-EU trade performance of **CN 4819** (cartons, boxes, cases, bags and other packing containers of paper, paperboard, cellulose wadding, etc.; including box files and similar office articles) over the period 2015–2025. The analysis draws on annual data for the European Union's trade with non-EU partners, combined with supplementary domestic production figures. Over the decade, the sector experienced a sharp increase in import penetration, a strong price-driven growth in export value, a dramatic reconfiguration of partner geography, and a notable expansion of EU manufacturing capacity. The following three chapters decipher the main dynamics and their underlying drivers.

1. A growing surplus under pressure: rising import volumes erode the EU's trade advantage

1.1 Export value rises entirely on the back of unit price increases, while shipped quantities decline

Between 2015 and 2025, total extra-EU exports of CN 4819 climbed **31.1% in value** (from €2.20 bn to €2.88 bn), yet the **quantity shipped fell by 4.5%** (from 1.13 mn tonnes to 1.08 mn tonnes). The implied unit price consequently surged by **37.3%** (€1 947/t to €2 673/t). This divergence indicates that EU producers have been able to command higher prices—likely due to quality upgrades, shifts toward more complex products, and general inflationary pressures—even as overall volumes contracted.

EU trade overview

1.2 Imports surge strongly in both volume and value, driven by corrugated cartons and flexible sacks

Imports grew much faster: value increased by **61.5%** (€1.39 bn → €2.25 bn) and quantity rose by **38.3%** (571 k t → 790 k t). The extra-EU balance therefore narrowed from a surplus of €804 mn in 2015 to €632 mn in 2025 (−21.4%).

The import expansion was concentrated in specific product segments. Corrugated cartons (481910) saw volumes soar by 80% and more than doubled in value; sacks and bags

(481940) recorded a 93% volume jump and an 81% value increase. These two categories alone accounted for the bulk of the import volume growth.

Product segment breakdown

1.3 The export price premium widens, reshaping the terms of trade

While both export and import unit values rose, the export price grew considerably faster (+37.3% vs. +16.8% for imports), creating a widening price gap. This premium suggests that EU-made packaging moved up the value chain, whereas imported substitutes—often from lower-cost suppliers—remained relatively cheaper. The combination of higher-priced exports and surging low-cost imports is re-balancing the EU's trade position in this sector.

2. Geopolitical reorientation: the collapse of Russia and the rise of Asian and near-neighbour suppliers

2.1 Russia vanishes as an export market, while the United States becomes the fastest-growing destination

The most dramatic shift in export geography is the **-88.8% decline** in shipments to the Russian Federation (from €126 mn in 2015 to €14 mn in 2025). The imposition of EU sanctions after the 2022 invasion of Ukraine essentially eliminated what had been the fifth-largest export market. In contrast, exports to the **United States grew by 126.4%** (€105 mn → €237 mn), making it the fourth-largest partner. Other dynamic markets include Morocco (+131.2%) and Serbia (+142.0%), reflecting diversification toward Mediterranean and Western Balkan economies.

Top export partners

2.2 Import sourcing diversifies in volume but concentrates in value as China cements its dominance

Imports from **China nearly doubled** (+97.5%) over the decade, reaching €1.04 bn in 2025 and accounting for the largest share of extra-EU imports. **Türkiye (+217.8%)**, **Serbia (+304.7%)** and **India (+380.3%)** also posted explosive growth, collectively transforming the import landscape.
Despite a more diverse set of suppliers in terms of volume (the import volume Herfindahl-Hirschman Index fell by 11.8%), the value concentration rose by 17.2% (HHI from 2 215 to 2 596). This indicates that while quantities are sourced from many partners, high-value imports—particularly from China—are increasingly dominant, reflecting a reliance on Chinese supplies of higher-priced packaging goods.

Import concentration

2.3 Neighbouring economies Serbia, Türkiye and India emerge as major low-cost suppliers

In addition to China, the EU's near neighbourhood gained substantial market share. Imports from **Serbia** rose from €25.7 mn in 2015 to €103.8 mn in 2025, and from **Albania** increased by 10.0% to €37.7 mn. **India**, starting from a very low base (€7.8 mn), climbed to €37.4 mn (+380.3%). These countries typically supply labour-intensive categories such as sacks, bags, and folding cartons, offering competitive prices that put pressure on domestic producers.

Top import partners

3. Domestic strength meets global exposure: rising EU production and the 2022 price shock

3.1 EU production expands vigorously, led by Central and Eastern European member states

EU domestic production of CN 4819 grew by **40.3% in quantity** (from 29 bn units in 2015 to 41 bn units in 2024) and by **56.7% in value** (€31.8 bn → €49.8 bn). This impressive expansion reflects strong industrial capacity, particularly in countries that are highly specialised in packaging. In 2025, the most specialised exporters were **Croatia (RSCA 0.43), Poland (0.38), Austria (0.25), Portugal (0.23) and Lithuania (0.12)**. Poland alone accounts for **14.9% of total EU CN 4819 exports**, far above its share of total EU trade.

Production volumes

Specialisation map

3.2 Trade intensity and export propensity rise, signalling deeper integration into global value chains

The EU's trade intensity (exports plus imports relative to production) climbed from **6.38% (2015) to 10.01% (2024)**, a 56.8% increase. Similarly, export propensity (exports/production) moved from 4.35% to 5.87% (+34.9%). These figures show that the sector is increasingly outward-oriented, both as a supplier to and a buyer from international markets. The growing import reliance, however, also means that the sector is more exposed to disruptions in foreign supply chains.

Trade intensity

Export propensity

3.3 The 2021–2022 price shock episode reveals vulnerability to external supply-side pressures

The volatility section identifies a cluster of significant **price shocks** concentrated in 2021 and 2022. The most severe was an import price surge from the **United Kingdom** in 2021: the unit price jumped by **244.9%** (from a baseline of €725/t to €2 502/t), while quantities collapsed to one-quarter of their previous level—likely a reflection of post-Brexit trade frictions and the UK's new customs regime.

Other large import price spikes hit **Türkiye (+47.7%)** and **Serbia (+37.7%)** in 2022. On the export side, similar upward price shocks occurred for **Iceland (+33.7%), Serbia (+29.0%), Albania (+24.7%)** and several other partners during 2022, driven by the surge in energy and raw material costs following Russia's invasion of Ukraine. The fact that many of these shocks had a lasting post-shock plateau (prices remained elevated) indicates a structural upward shift in input costs that EU producers and their trading partners had to absorb.

Price shock events

Conclusion

The decade 2015–2025 profoundly reshaped the EU's trade in paperboard packaging containers. On the export side, value growth was entirely propelled by rising unit prices, while volumes edged downwards and the market mix shifted away from Russia toward the United States and neighbouring countries. Imports, buoyed by China and a new generation of low-cost suppliers (Türkiye, Serbia, India), expanded rapidly in both volume and value, narrowing the EU's trade surplus. At the same time, domestic production capacity surged by over 40%, cementing Central and Eastern Europe's role as the manufacturing heartland. The growing trade intensity and the 2021–2022 price shock episode, however, highlight the sector's increased exposure to global supply-chain disruptions and input-cost volatility. Looking ahead, the ability of EU producers to maintain their price premium while managing import competition and supply-side risks will be decisive determinants of the sector's resilience.

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