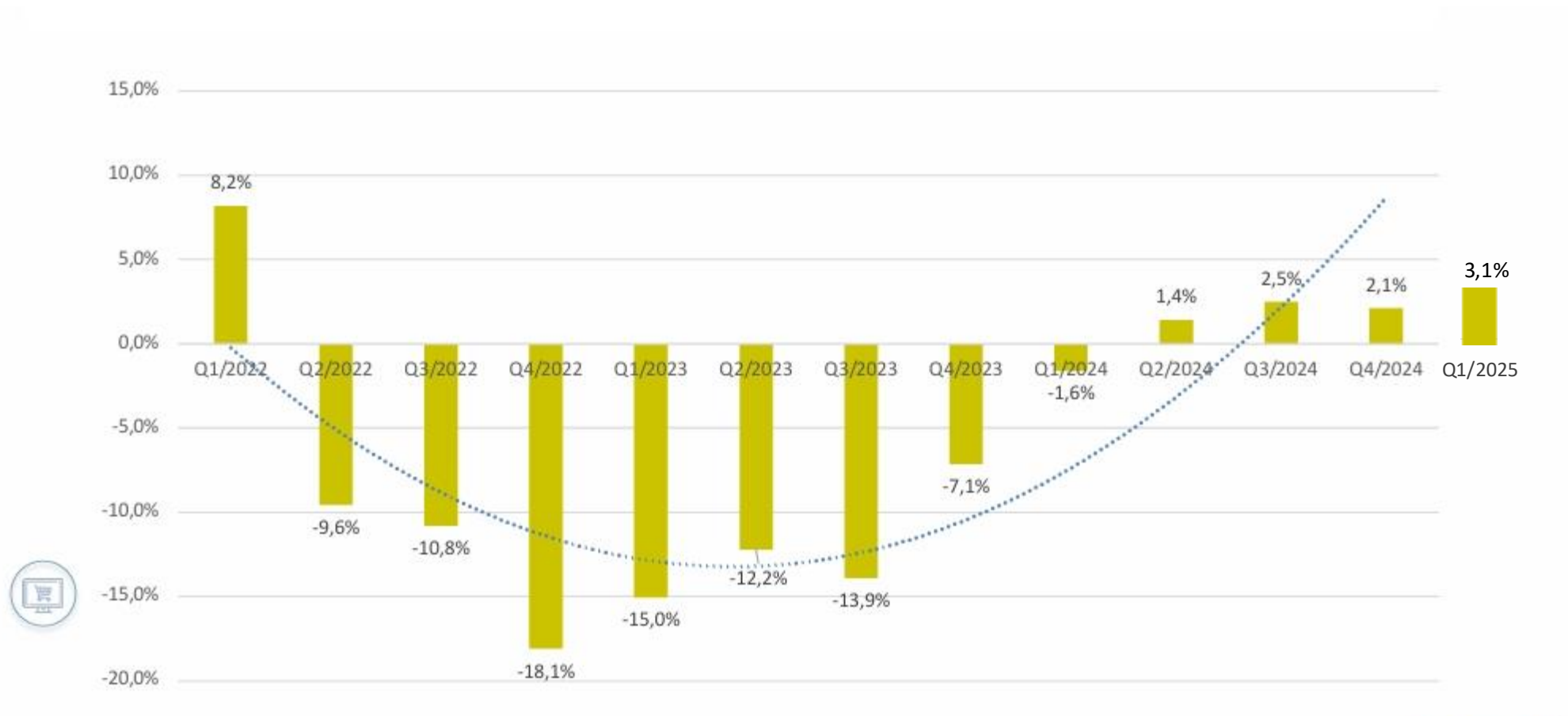


E-commerce some facts and figures



Ecommerce back to growth in a phase of weak economy in Europe

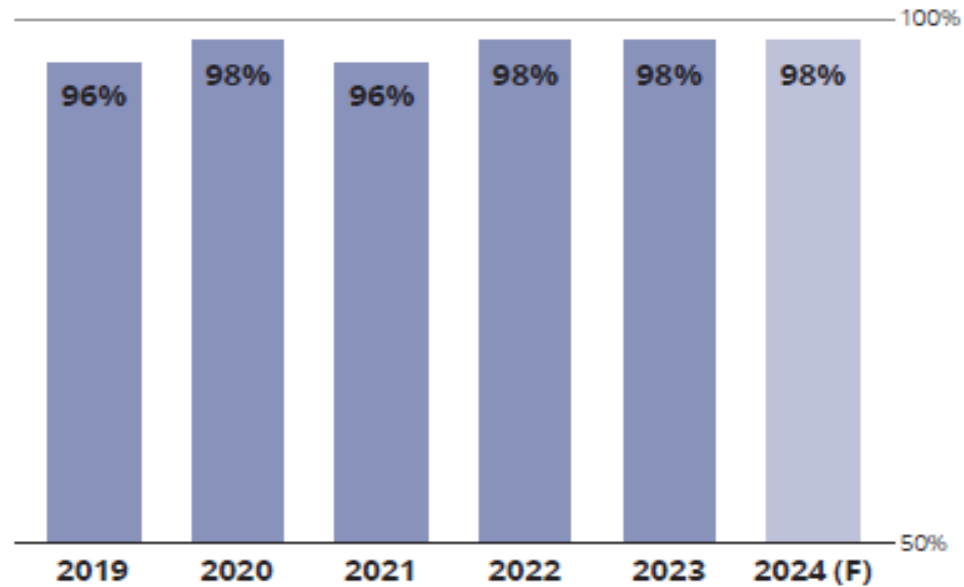
(Quarterly revenues not inflation adjusted)



United Kingdom

Internet users

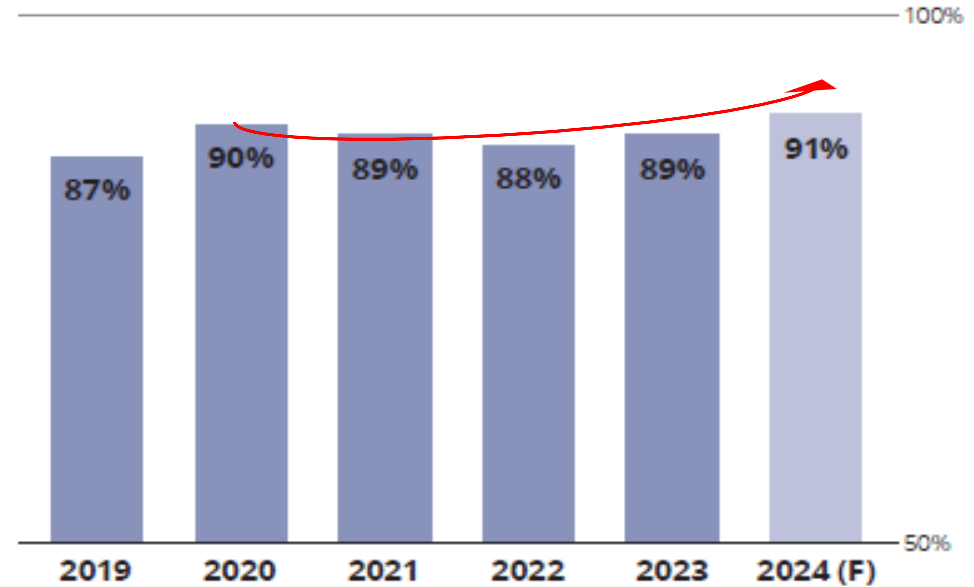
Percentage of the population aged 16-74 accessing the internet



SOURCE: EUROSTAT, DATAREPORTAL

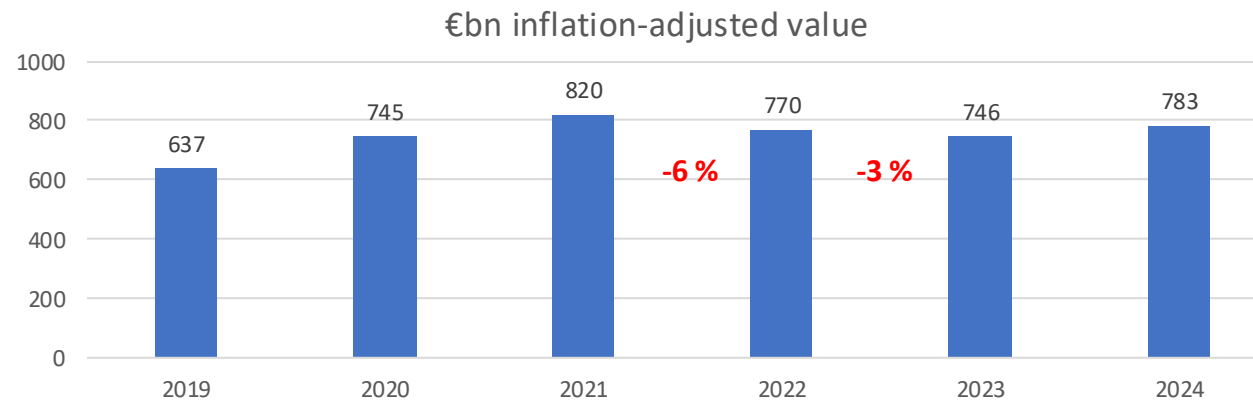
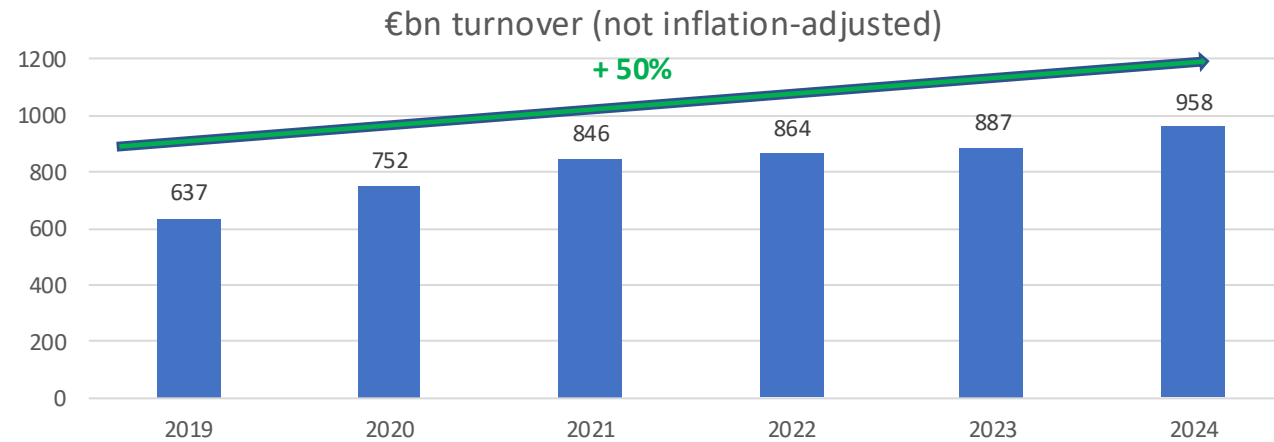
E-Shoppers

Percentage of the population aged 16-74 who bought goods or services online



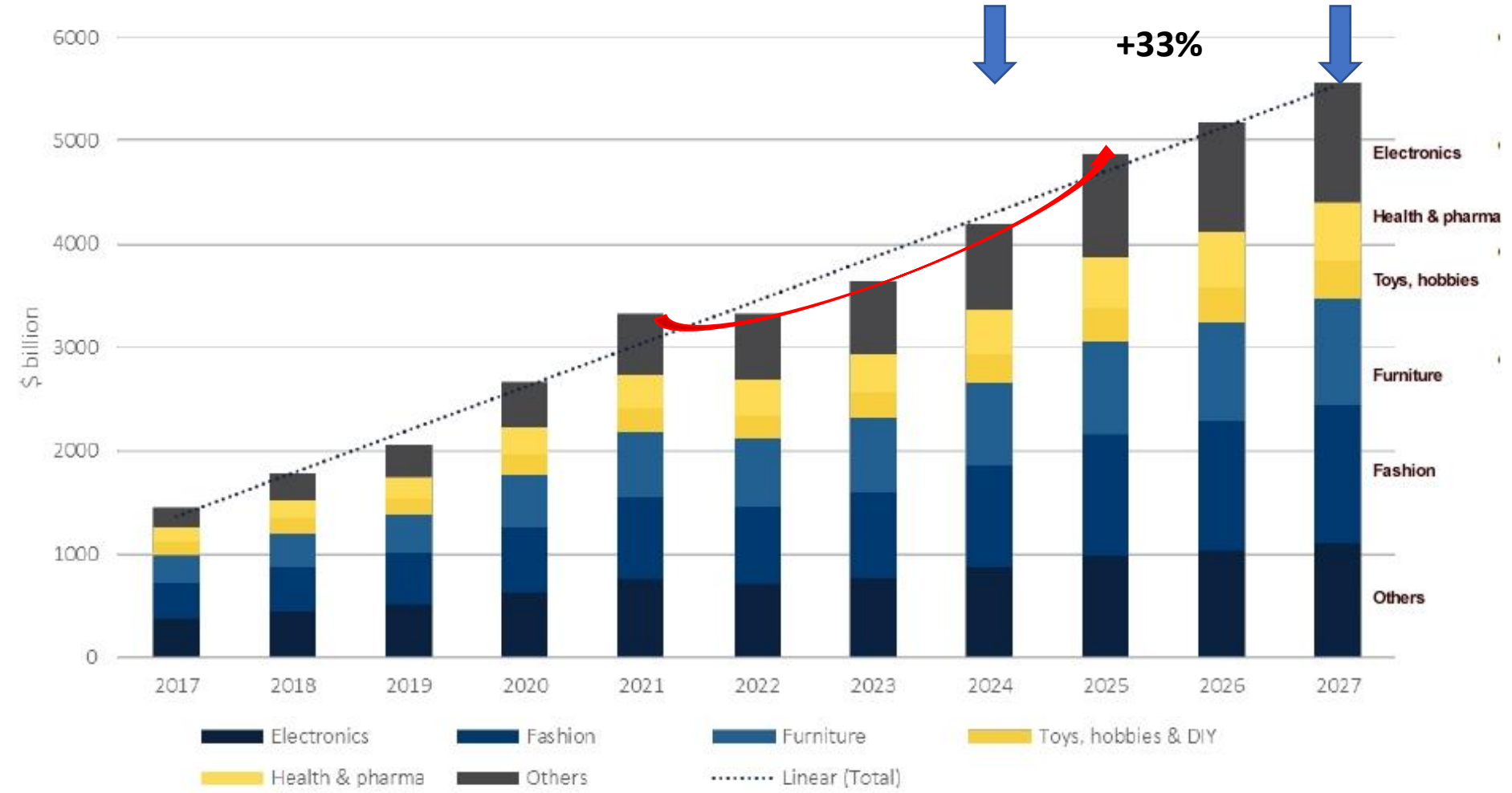
SOURCE: EUROSTAT, STATISTA

European b2c e-commerce turnover 2019 – 2024



Source STATISTA edited by UK

Global B2C e-commerce growth 2017 - 2027



Source: Data from International Trade Administration

Let's take a look at the product categories



The top-selling product categories 2024

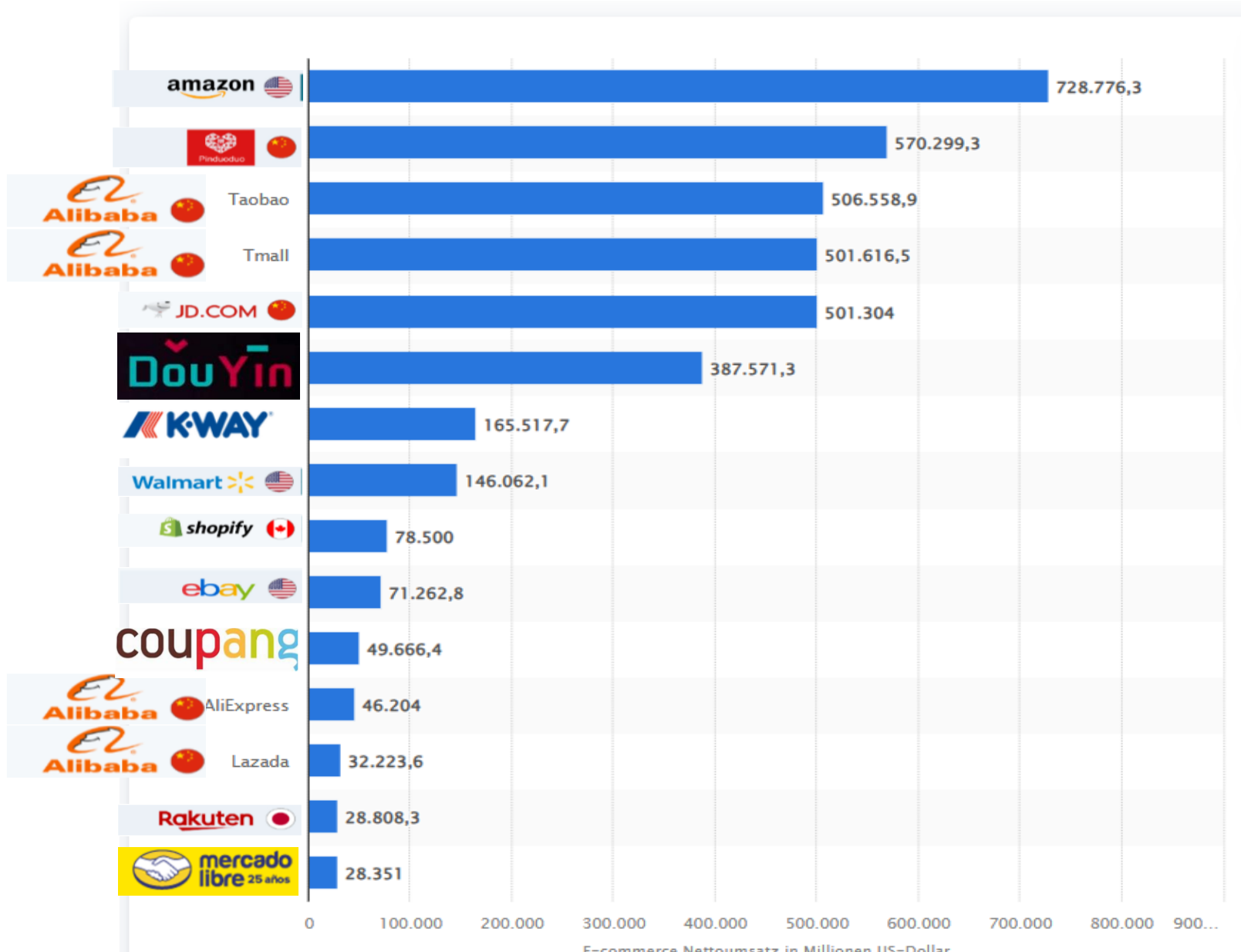
The product categories with the best performance in 2024

Category	E-commerce revenue share	2024 vs. 2023	Category	E-commerce revenue share	2024 vs. 2023
Fashion	18,0%	0,0%	Health & pharma	2,1%	6,5%
Electronics	15,0%	-2,4%	Food	5,0%	5,5%
Household goods	8,5%	4,5%	Pet-food	2,2%	5,4%
Computer equipment	7,5%	-0,2%	Flowers	3,6%	4,8%
Shoes	5,0%	0,8%	Household goods	8,5%	4,5%
total	54,0%			21,4%	

Losers were books and e-books (-2,4%), office supplies (- 1,8%) and Electronics (- 2,4%)

Top 15 worldwide e-commerce platforms

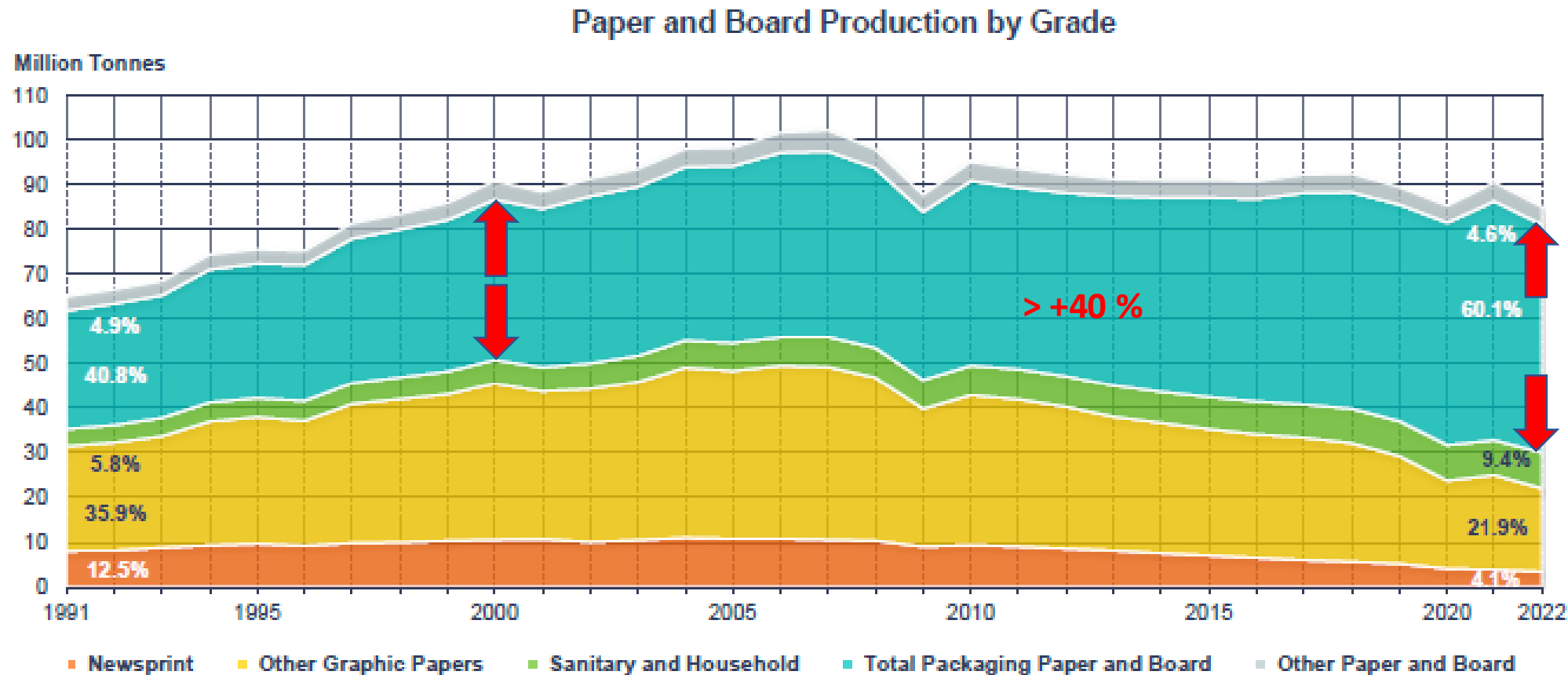
in mio. US\$



E-Commerce packaging is growing

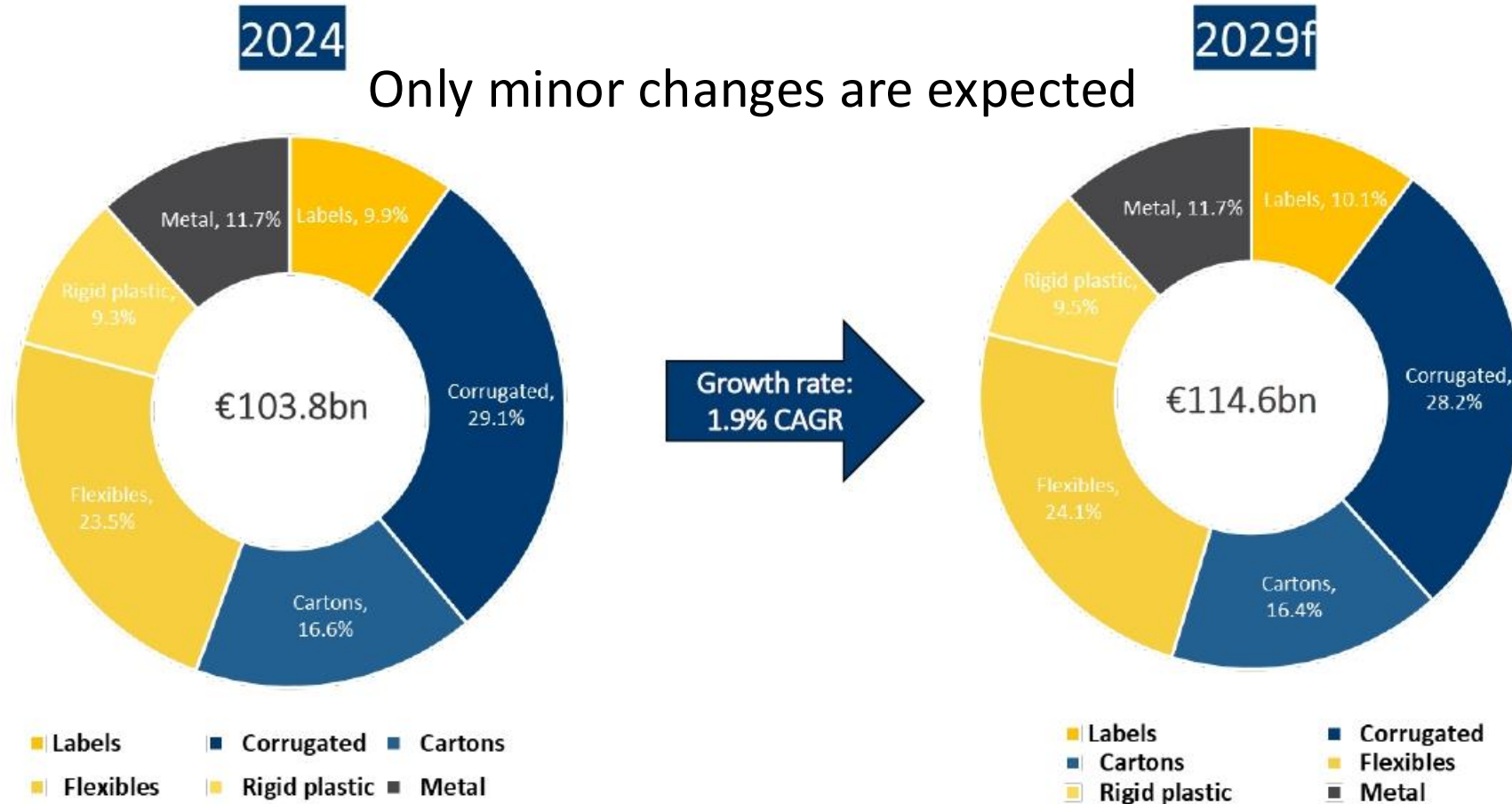
- E-commerce is a major driver for packaging
- Significant growth through the Covid-19 pandemic
- Global growth forecast at 15.3% p.a. between 2017 and 2027
- Global growth forecast at 33% between 2024 and 2027
- Asia is significantly above this, North America and Europe a little below

Packaging papers and board are growing, while graphic papers shrink



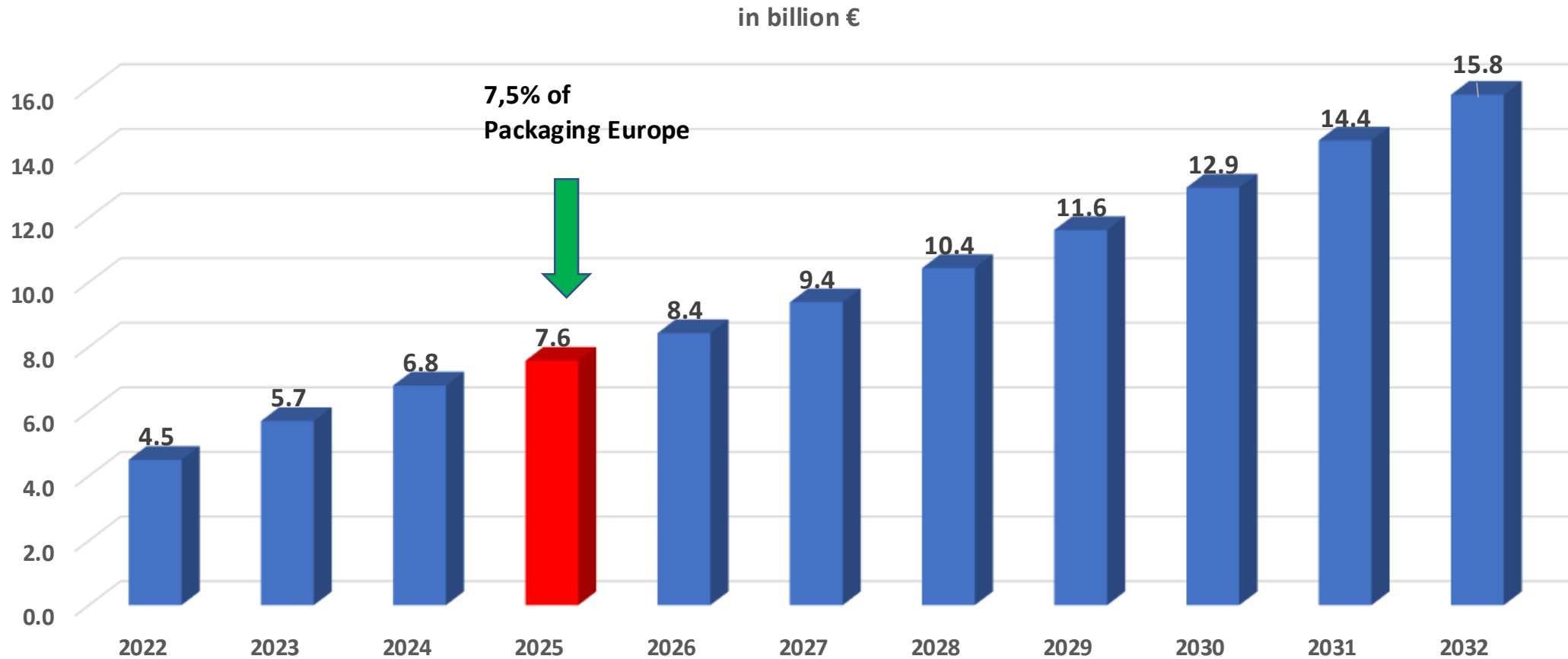
Packaging in Europe

(% share by value, constant 2023 prices and exchange rate)



Note: Countries considered include the EU27 + UK, Norway, and Switzerland

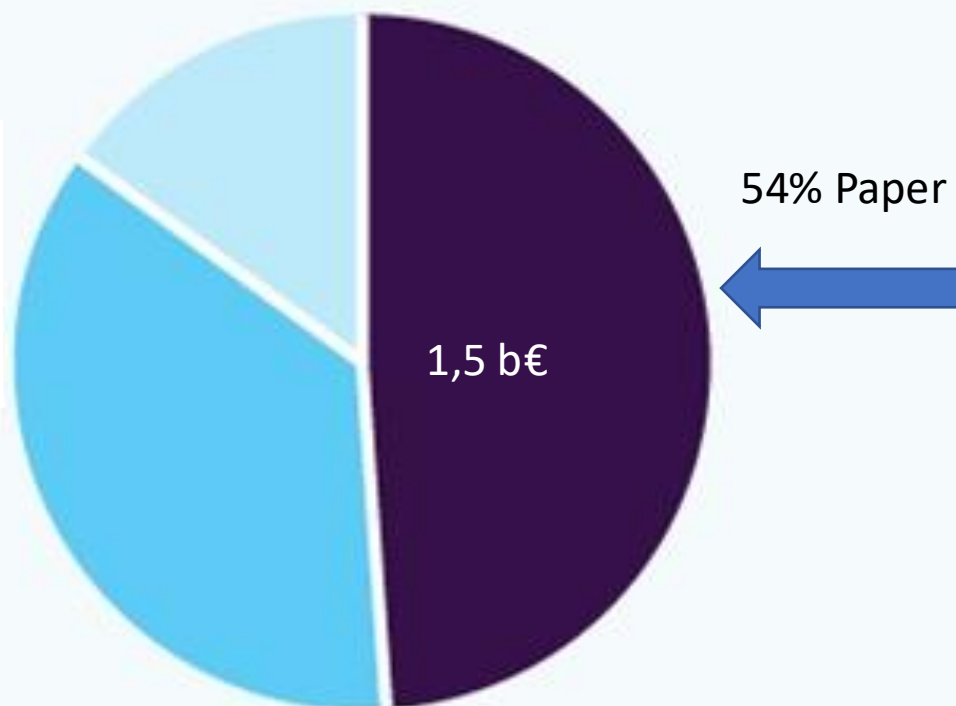
The E-Commerce Packaging Market 2022-2032



Europe Mailer Packaging Market

share, by end-use,

- ▶ Plastic Resin (PE, PP, PET, PVC, Biodegradable & Compostable Resin, Recycled Resin)
- ▶ Paper
- ▶ Cardboard



● E-commerce
 ● Shipping & Logistics
 ● Manufacturing & Warehousing

3,4 billion €

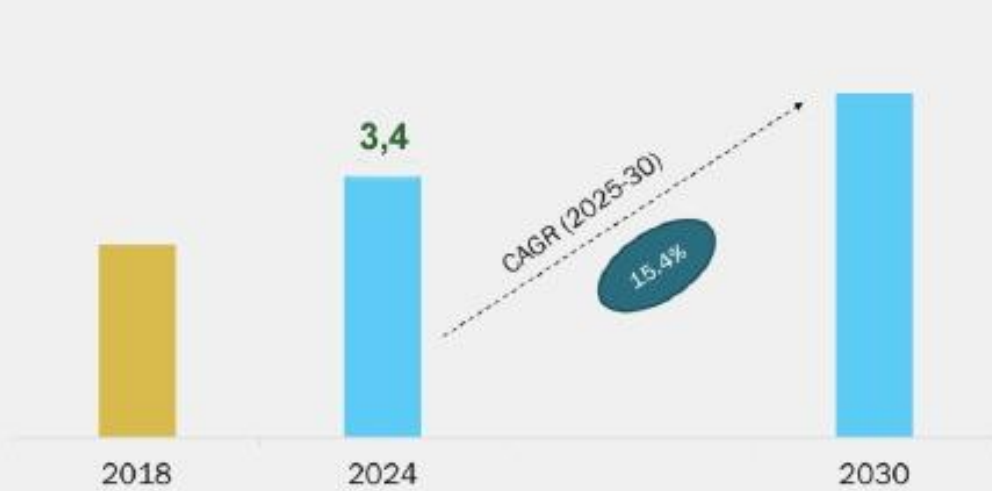
European Market Size,
2024

In comparison:
The European envelope market has a total size of < 0.6 billion €

Source:
www.grandviewresearch.com

Fig.1 Mailer Packaging Market- Market Snapshot

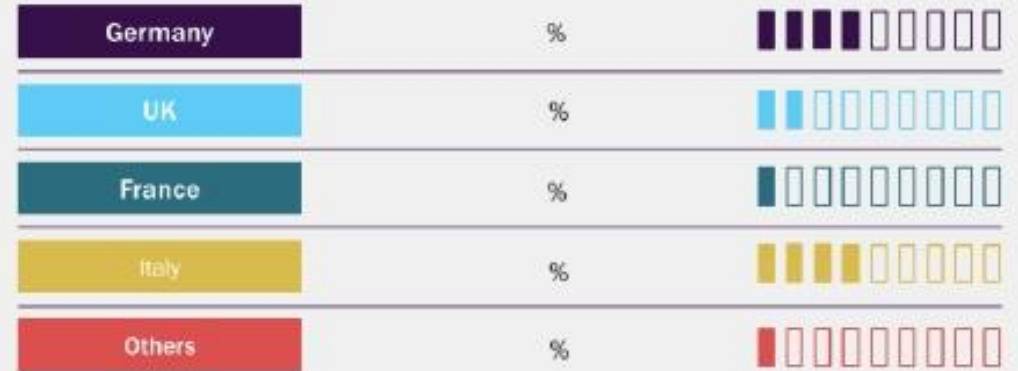
Europe Mailer Packaging Market Size (3,4 billion €)



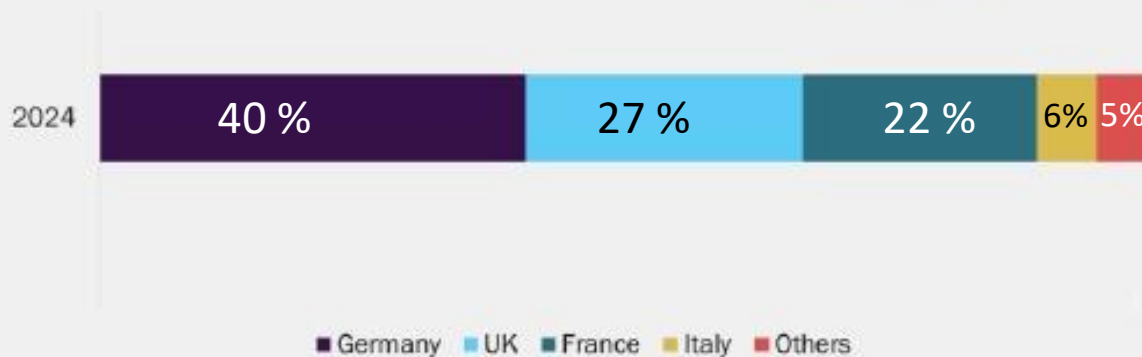
CAGR% (2025-2030)

Growth Momentum**

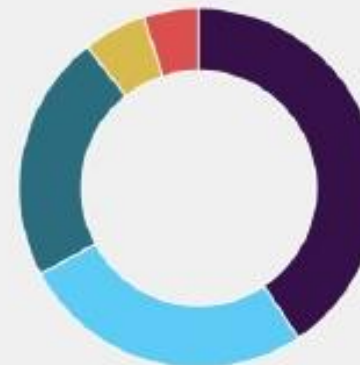
LOW MEDIUM HIGH



Country Mailer Packaging Market Size 3,4 billion €



Country Market Penetration, 2024

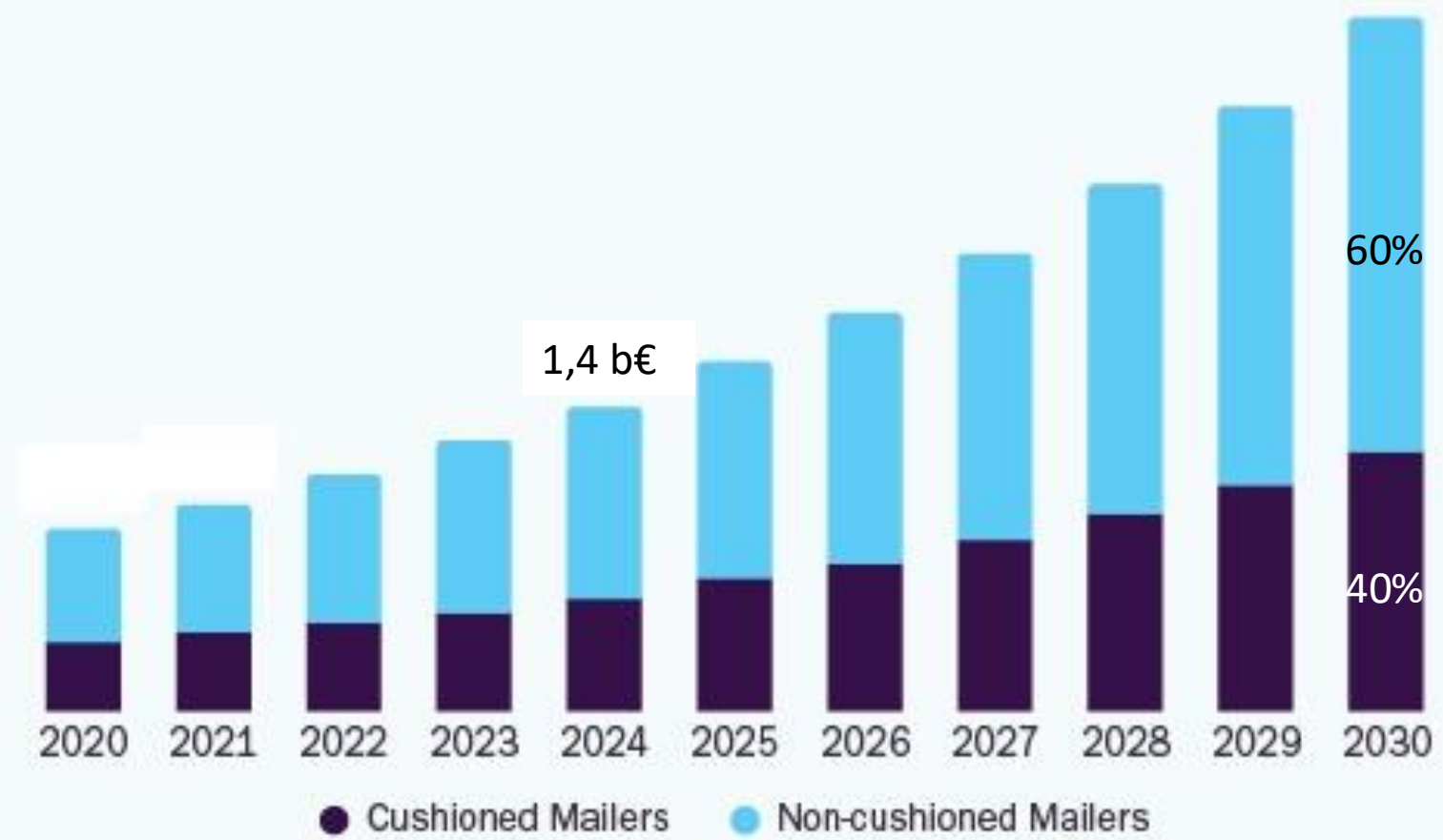


Key Regional Trend

Germany region dominated this space in 2023 owing to the rapid growth of e-commerce sector in the region

Germany Mailer Packaging Market

size, by product, 2020 - 2030



14.2%

Germany Market CAGR, 2022 - 2030

Source: www.grandviewresearch.com

Some prominent players in the European mailer packaging Market

Sealed Air

Mondi Group

Intertape Polymer Group

Henkel Corporation

Polisac SA

VP Group

Storopack

Hans Reicheecker GmbH

Abriso Jiffi

3 M

Pregis LLC

Dinkhauser

There is still a lot to do...

...today less than 20% of all FEPE deliveries are e-commerce driven



There is still a lot to do...

...today the market share of all FEPE members in the relevant e-commerce market is not more than 10%

