

SB Packaging



**Security of supply,
price stability and
additional production
capacity in the
containerboard and
cardboard market**



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Editorial

The European corrugated board and packaging industry faces an increasing challenge: ensuring a stable supply of paper is becoming more complex.

Rising energy prices, market concentration in paper production and increasing volatility directly affect the cost structure of packaging manufacturers.

For converters, this means one thing above all: paper procurement becomes a crucial competitive factor.

Paper represents the largest cost component in many corrugated and solid board products. At the same time, many packaging manufacturers are traditionally dependent on just a few producers.

This development shifts the role of paper procurement from an operational function to a strategic management tool. Without adjusting the procurement structure, dependence on external market movements increases.

Against this background, structured procurement approaches that specifically expand existing systems are gaining in importance.

THE MARKET IS CHANGING

The European containerboard and cardboard market has changed dramatically in recent years.

Several developments are shaping the industry today:

- rising energy prices
- increasing consolidation of the paper industry
- increasing demand for sustainable packaging
- growing demands of international brands
- increased regulatory requirements



These changes increase the pressure on packaging manufacturers to strategically secure their raw material supply and to manage procurement more actively.

PAPER AS A COST FACTOR

For corrugated board and packaging manufacturers, paper represents the largest share of production costs.

Depending on the product structure, the share can be between 50% and 80% of the total packaging costs.

Price movements in the paper market therefore have a direct impact on margins, calculations and competitiveness.

At the same time, a strong dependence on individual paper suppliers can lead to structural risks.

These may include, among other things:

- limited delivery flexibility
- limited availability of certain qualities
- price volatility
- limited scalability with increasing demand

Diversified paper procurement thus becomes a key control factor for margins and competitiveness.

Structured paper procurement for packaging manufacturers

Structured procurement approaches enable access to additional production capacities, increase market transparency and improve supply stability.

Additional production capacities

Structured procurement creates access to industrial paper production and expands the available supplier base.

Price and market transparency

Direct production partnerships create transparency regarding price developments and market structures.

Stability of supply

Structured procurement stabilizes paper supply planning and reduces dependence on individual market movements.

SB Packaging anchors this structure as a complementary level in existing procurement systems and expands it in a targeted manner.

Operational Elements

Access to additional paper capacity

Direct connection to industrial containerboard and cardboard production.

Diversification of the supplier base

Reducing dependency and increasing alternative options.

Transparency

Information on price trends and availability.

Flexible procurement

Support in adjusting quantities and qualities.

Support for international supply chains

Organization of international supply structures.

These elements constitute the operational implementation of structured procurement models.

SB Packaging anchors these elements in a structured procurement logic.

Production partnership

The implementation of structured procurement models requires a direct link to industrial production capacities. An important component of SB Packaging's structure is the production partnership with Kipaş Paper.

Kipaş Paper operates a modern containerboard and cardboard production facility with a focus on recycled packaging papers.

These qualities are used worldwide in corrugated board production.



Quality and technical standards

For packaging manufacturers, stable technical properties of the papers used are crucial.

Structured procurement models are based on clearly defined quality requirements.

SB Packaging consistently implements these requirements within its procurement structure.

These include, among others:

- stable paper qualities
- documented production processes
- standardized raw material qualities
- international certifications

This enables reliable integration of the papers into existing production processes.

Scalable paper procurement

Many packaging manufacturers supply several markets within Europe.

SB Packaging maps this structure across multiple markets and anchors it in existing supply chains.

A structured procurement organization enables:

- reliable paper deliveries
- flexible quantity control
- international logistics solutions
- long-term supplier relationships



The future of paper procurement

The containerboard and cardboard market will continue to be shaped by several factors in the future:

- increasing demand for sustainable packaging
- increasing demands of international brands
- structural changes in the paper industry



The future development of the market requires increasingly structured and diversified paper procurement.

One-sided dependencies and limited market transparency become a structural risk.

Expanded procurement models structurally reduce risks and increase supply stability.

SB Packaging is anchoring this expansion as an additional structure in existing procurement systems.