

Australia Paper and Paperboard Packaging Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The Australian paper and paperboard packaging market is expected to register a CAGR of 4.23% over the forecast period. Currently, consumers in the country prefer recyclability and biodegradability as essential packaging parameters over reusability. This underlines the growing concerns of consumers about the environmental impact of packaging waste in the future.

Key Highlights

With advanced technologies like digitally printed paperboard attracting high investments, the product distributors are increasingly adopting the following technology due to the solution offering interactive and colorful designs for the consumers to notice.

In addition, factors like urban populations' rising environmental consciousness, the proliferation of sustainable packaging demand, the rise in demand for convenient packaging, the expansion of e-commerce, and the rising demand for electronic goods, home, and personal care products are all driving the country's paper and paperboard packaging market forward.

The country is also witnessing huge demand for corrugated box packaging with the growth of the e-commerce sector. For instance, according to Australia Post, Year-on-Year sales growth increased for e-commerce industries like home and garden (37%), food and liquor (32%), hobbies and recreational goods (31%), variety stores (30%), fashion (27%), health and beauty (24%). Also, according to National Australia Bank, the distribution of online spending on homeware and appliances, department stores, grocery and liquor, personal and recreational, fashion, games, and toys in August 2021 accounted for 23.8%, 16.3%, 15.3%, 12.45, 10.9%, 8.9% respectively. This has further increased the demand for corrugated box packaging of end products and secondary packaging, such as folding cartons that must be delivered to online shoppers' doorsteps.

Moreover, vendors are expanding their presence in the country owing to the increased demand for paperboard, folding carton, and corrugated box packaging. For instance, in November 2021, UFP Industries, Inc. announced that one of its wholly-owned subsidiaries, The UBEECO Group, has acquired The Box Pack Trust with an investment of AUD 8.2 million (~ USD 5.4 million) to expand its presence in corrugated packaging. The acquisition also helps the company to scale in lithographic cardboard packaging

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with the latest CAD design and finishing techniques. Further, the merger also helps the company gain a more significant customer base in the food and beverage, confectionery, pharmaceutical, industrial and agricultural sectors.

The packaging industry is bleeding profusely due to an uncontrolled rise in the price of its primary raw material, Kraft Paper. Kraft Paper Mills attributes the decreased availability to increased costs of imported and domestic wastepaper on the supply side following the COVID-19 pandemic lockdowns and widespread international logistics disruptions.

COVID-19 had a negative impact on the packaging industry, resulting in a nationwide lockdown, corporations shifting their sourcing away from China, and packaging materials being reconsidered. Despite a significant effect on the supply side of paper packaging, considerable growth in end-user demand in specific applications has significantly expanded the scope of paper packaging.

Australia Paper & Paperboard Packaging Market Trends

Corrugated Boxes are Expected to Hold Significant Share

Corrugated packaging has emerged as a critical driver of this market due to its evolution as a point-of-sale display in retail applications, coupled with continuous development in small flute and high-quality graphics board, which is enabling corrugated boxes to penetrate traditional folding carton applications. Corrugated box packaging is a useful and cost-effective solution to protect, preserve, and transport a wide range of cosmetic products. The corrugated box has the benefits of biodegradability, and recyclability, which have made it an essential part of the packaging industry.

Australia is experiencing a surge in industrialization, providing substantial opportunities for main corrugated board market competitors. Corrugated boxes are used in numerous regional industries, such as food and beverage, electronics, and e-commerce. Corrugated boxes will be in more demand in the country as people become more aware of ecological and cost-effective packaging options.

In addition, growing environmental awareness is projected to lead to increased demand for greener packaging options.

Government attempts in Australia to restrict plastic packaging is also predicted to boost product demand. In accordance with this, the demand for electronic goods, automotive parts, home care, and beauty & personal care products from domestic and international markets is increasing the demand for corrugated boxes.

Additionally, growing demand for online purchase is expected to fuel the demand for paper and paperboard packaging in Australia. For instance, according to Australia Post, New South Wales had the highest percentage of eCommerce purchases in the country, at 31.6%. The state with the next largest share of online purchases and the second largest state in terms of population was Victoria with 30%.

Increasing Growth of E-commerce Creating Demand for Various Paper and Paperboard Packaging Types

In the global economy, recycled paper and paperboard products are essential, particularly packaging and industrial paper grades. Corrugated cartons are products made from recycled paper and paperboard. All corrugated cartons, around half of them, are made using recycled materials. Corrugated packaging has become a significant driver for point-of-sale displays in retail applications, allowing corrugated boxes to compete with traditional folding carton applications.

Additionally, the e-commerce sector has become a prominent participant in recent years. Restaurants, various retailing industries, and well-known e-commerce enterprises have been employing corrugated board boxes as the primary packaging, and they rely on plastic wrapping for specific goods.

For instance, as per the Australian Bureau of Statistics, sales in shops and online in April 2022 were USD 33.9 billion, with gains in the "other retailing" sector of 14.4% and improvements in cafes, restaurants, takeout services, clothing, and footwear of 14.7%.

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While food retailing increased by 6.5%, domestic products increased by 7.4%. The weakest growth in sales was seen in department shops (5.4%).

According to Australia Post, the variety shop e-commerce segment grew by over 16 % in 2021 compared to the previous year. Other e-commerce areas that grew by more than 12% year over year (Y-O-Y) were fashion and home and garden, which drive the demand for paper and paperboard packaging in Australia. This is expected to support the demand for paper and paperboard packaging in Australia.

Australia Paper & Paperboard Packaging Market Competitor Analysis

The Australian paper and paperboard packaging market is moderately fragmented, with significant players such as Visy Industries, Paper Australia Pty Ltd, and Abbe Corrugated Pty. Ltd., occupying most of the market share. The companies in the country are forming multiple partnerships and mergers to increase their market share.

In January 2022, Amcor PLC launched a new platform of paper-based packaging products. The company plans to gradually extend its new paper-based offerings into a wide variety of applications such as coffee, drink powders, seasoning, and soups in the Americas and Asia-Pacific regions. AmFiber innovations will join other recently introduced Amcor paper-based products, including butter and margarine solutions in Latin America, cheese in Europe, and confectionery in Australia.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET INSIGHTS

4.1 Market Overview

4.2 Industry Value Chain Analysis

4.3 Industry Attractiveness - Porter's Five Forces Analysis

4.3.1 Threat of New Entrants

4.3.2 Bargaining Power of Buyers

4.3.3 Bargaining Power of Suppliers

4.3.4 Threat of Substitute Products

4.3.5 Intensity of Competitive Rivalry

4.4 Assessment of the Impact of COVID-19 on the Market

5 MARKET DYNAMICS

5.1 Market Drivers

5.1.1 Increasing Demand from the Food and Beverage Sector

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- 5.1.2 Increasing Growth of E-commerce Creating Demand for Various Paper and Paperboard Packaging Types
- 5.2 Market Restrain
 - 5.2.1 Increasing Raw Material Costs and Outsourcing
- 6 Overview of the Global Paper and Paperboard Packaging Market
- 7 AUSTRALIA PAPER INDUSTRY STATISTICS
 - 7.1 Industry Revenue of Pulp, Paper and Paperboard Manufacturing in Australia (in USD million)
 - 7.2 Corrugated Paper or Paperboard Import and Export (Value and Quantity)
- 8 AUSTRALIA CONTAINERBOARD STATISTICS
 - 8.1 Kraft liner Import and Export (Value and Quantity)
 - 8.2 Test liner Import and Export (Value and Quantity)
 - 8.3 Fluting Paper Import and Export (Value and Quantity)
- 9 AUSTRALIA PULP AND PAPER MARKET LANDSCAPE
 - 9.1 Printing and Writing
 - 9.2 Newsprint
 - 9.3 Tissue
 - 9.4 Packaging
 - 9.5 Others
- 10 AUSTRALIA PACKAGING MARKET LANDSCAPE
 - 10.1 Demand Analysis - By Material Type
 - 10.1.1 Paper and Paperboard
 - 10.1.2 Glass
 - 10.1.3 Metal
 - 10.1.4 Plastic (Rigid and Flexible)
- 11 AUSTRALIA PAPER AND PAPERBOARD PACKAGING MARKET SEGMENTATION
 - 11.1 By Material
 - 11.1.1 Folding Cartons
 - 11.1.2 Corrugated Boxes
 - 11.1.3 Other Materials (Flexible Paper, Liquid Cartons)
 - 11.2 By End-User Industry
 - 11.2.1 Beverage
 - 11.2.2 Food
 - 11.2.3 Pharmaceutical and Healthcare
 - 11.2.4 Personal Care and Household Care
 - 11.2.5 Other End-user Industries
- 12 COMPETITIVE LANDSCAPE
 - 12.1 Company Profiles
 - 12.1.1 Visy Industries (Visy Industries Holdings Pty Ltd)
 - 12.1.2 Opal Group (Paper Australia Pty Ltd & Nippon Paper Industries)
 - 12.1.3 Abbe Corrugated Pty Ltd
 - 12.1.4 Austcor Packaging Pty Ltd

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- 12.1.5 Pro-Pac Packaging Limited
- 12.1.6 JacPak Pty Ltd
- 12.1.7 Networkpak Pty Ltd
- 12.1.8 United Printing & Packaging Company
- 12.1.9 Oji Fibre Solutions (AUS) Pty Ltd

13 FUTURE OUTLOOK OF THE MARKET

Australia Paper and Paperboard Packaging Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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