

Europe Paper Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Europe Paper Packaging Market size is estimated at USD 91.71 billion in 2024, and is expected to reach USD 114.12 billion by 2029, growing at a CAGR of 4.47% during the forecast period (2024-2029).

Key Highlights

-Paper packaging is a low-cost and versatile way to protect, store, and transport various products. It can also be customized to satisfy the needs of consumers or product-specific requirements. Attributes like biodegradability, lightweight, and recyclability of paper packaging make it an essential component for packaging. Due to such factors, the demand for such packaging has increased in the food and beverage sector.

-In May 2022, by collaborating with PulpexLtd, a sustainable packaging technology firm in the United Kingdom, Kraft Heinz Co. developed a paper-based Heinz ketchup bottle. The bottle is manufactured from environmentally sourced wood pulp and is renewable and recyclable. Following that, Kraft Heinz will test prototypes to gauge performance before putting the bottle to the test with consumers and finally bringing it to market. The container would enable Kraft Heintozto to make all packaging recyclable, reused, or compostable globally by 2025. By 2050, the corporation wants to be net-zero regarding greenhouse gas emissions.

-Also, with the focus shifting towards sustainability, paper and paperboard packaging are expected to gain traction, with the country pushing for paper packaging products over plastic packaging for various end-user industries, including healthcare, food and beverages, retail, and e-commerce. Surging demand for paper packaging in the e-commerce industry will support market growth.

-In July 2022, Amazon replaced plastic air pillows with paper for e-commerce across Europe. This paper, called dunnage, is specially designed to keep the product from moving inside the package, preventing damage. Packaging applies to all products sold through Amazon, including those that use Amazon's fulfillment services. Getting rid of plastic is a step in the right direction

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for Amazon. Still, paper dunnage is heavier than its plastic predecessor, which could increase the carbon footprint of Amazon's deliveries in countries such as Spain. Amazon's latest step is to reduce single-use plastic packaging after switching from single-use plastic bags for Amazon-fulfilled shipping to paper bags and cardboard envelopes across Europe.

-One significant challenge is the limitation of paper packaging in handling heavy materials. Paper is more structurally strong than polymers or metals, making it less suitable for packaging heavy products or providing the same level of protection. This limitation has led to the dominance of polymers and metals in industries requiring heavier items' packaging. Additionally, the environmental impact of paper packaging is a concern. Procuring raw materials for paper production, particularly wood pulp, can contribute to deforestation if not managed sustainably. Deforestation can adversely affect ecosystems, biodiversity, and climate change. Furthermore, producing paper, mainly through specific processes like bleaching, can discharge dioxins, which are hazardous pollutants. These pollutants can have detrimental effects on the environment and human health.

-The European paperboard packaging industry experienced a positive impact from the COVID-19 pandemic, primarily driven by the food and beverage sector. The early spread of the virus led to an increase in demand for essential packed food and beverage products as consumers stocked up on supplies. This surge in demand posed challenges for companies as they had to adapt to rapidly changing demand patterns while facing supply chain disruptions. The market also experienced rapid growth of e-commerce during the pandemic, further fueling the demand for paperboard packaging in the food and beverage industry. With more people opting for online shopping, there was an increased need for packaging materials to ensure the safe delivery of products. This trend was not limited to the food and beverage sector alone, as online pharmacy and drug store sales also experienced significant growth, contributing to the increased demand for paperboard packaging.

Europe Paper Packaging Market Trends

Beverage Packaging will Drive the Market Growth

- Paper is also easier to recycle than plastic because it is a non-synthetic material that may be repulped and reintroduced into production. Water, alcoholic, and non-alcoholic beverages can be packaged in paper-based bottles. Personal care firms also utilize it for shampoos, conditioners, lotions, and moisturizers.

- Beverages, including fruit juices, alcoholic drinks, and meal replacement shake, embrace paper packaging solutions. However, the quality of beverages is affected by pH, storage temperature, pressure, and contaminants. Changes in the levels may alter the composition of the beverage. Companies increasingly employ biodegradable packaging products with high barrier resistance (heat, moisture, and bacteria) to eliminate possible oxidation. In April 2022, a UK-based company, "When in Rome," launched a paper wine bottle into Ocado. The bottle is developed in collaboration with sustainable packaging company Frugalpac and is made from 94% recycled paper, and is claimed to have a carbon footprint 84% lower than a single-use glass bottle.

- The increasing wine consumption in the region and growing sustainability packaging are expected to support market growth in the forecast timeframe. According to the International Organisation of Vine and Wine (OIV), European countries had a significant share of Wine consumption in 2022. France accounted for 11% of global wine consumption in 2022, followed by Italy and Germany with 10% and 8%.

- In response, several beverage manufacturers introduced beverages in carton packs. In May 2022, Buen Vato, one of the world's first tequila in a cardboard bottle manufactured from 94% recycled material, will debut in Europe in July 2022, focusing on the Swedish market. Tequila Buen Vato aims to revolutionize the beverage business by investing in sustainable manufacturing, transportation, and CSR initiatives.

- Similarly, in November 2022, Huhtamaki, one of the leading global manufacturers of sustainable packaging solutions, launched the expansion of its existing paper-based packaging manufacturing facility in Nules, Spain. This latest investment reflects the growing demand for renewable and recyclable paper-based packaging as an alternative to rigid plastics. Nules' factory is the company's global centre of excellence, developing innovative and sustainable packaging solutions for European customers.

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Germany is Expected to Hold a Significant Market Share

- With the rapidly changing technological environment, the packaging industry is also set to improve its products by adopting various technologies to enhance and improve productivity. Due to increased legislation against excessive levels of plastic pollution, green packaging materials have the potential to see a rise in utilization throughout the forecast period. As a result of these constraints, paper and glass packaging are expected to be in high demand in the business, as they can be used as plastic substitutes.
- Owing to sustainability factors, players in the region are focusing on paper-based packaging. In February 2022, Amcor launched high-barrier recyclable paper-based packaging for snacks and confectionery. FMCG brands have successfully tested Amcor's LifeSpans material. It is expected to appear in European stores for snacks and confectionery in 2022, with expansion planned into coffee and culinary.
- Similarly, in January 2022, Amcor launched a platform for paper-based packaging. AmFiber innovations aim to redefine the abilities of standard paper packaging, providing a more comprehensive range of features and functional benefits to fulfil the changing demands of customers.
- Various international companies are also focused on expanding their business in the country. For instance, in November 2022, Solenis, one of the leading global producers of speciality chemicals, opened two new international centres to help drive more sustainable solutions for the consumer paper packaging industry. One centre is virtual, allowing customers to participate remotely in lab experiments, while the other is in a new facility in Monchengladbach, Germany. Both centres are designed to simulate and test customer processes, processing programs, and paper/board properties to optimize performance, efficiency, and cost with a focus on sustainability.
- Driven by the various government regulations regarding sustainable packaging and growing consumer awareness about their buying choices' impact on the environment, the demand for paper and paperboard packaging is anticipated to rise in the country during the forecast period. According to Statistisches Bundesamt, in 2022, Germany generated 46% of its packaging industry revenue from paper packaging, and 34 % was made from plastic packaging.

Europe Paper Packaging Industry Overview

The Paper Packaging Market in Europe appears to be consolidated as a significant market share is generated by a few firms. This industry research report offers information about players' competitive environment in this market. Major players include Smurfit Kappa, DS Smith PLC, Mondi Group, and Hamburger Containerboard GmbH.

In April 2023, DS Smith announced the launch of a EUR 145 million multi-year upgrade program for its kraft paper mill in Viana, Portugal. The new investment package will equip the mill with the latest paper-making machinery and help rebuild the existing paper machine. This effort will help minimize factory carbon emissions while strengthening DS Smith's commitment to contributing to Portugal's circular economy. This investment will be used to install a recovery boiler, which will improve the overall environmental performance of the plant by increasing steam efficiency by approximately 25%.

In May 2022, Smurfit Kappa developed a sustainable and innovative water-resistant paper. AquaStop is part of Smurfit Kappa's new TechniPaper portfolio, which brings a new era of sustainable packaging (Grease-proof, slip-resistant, moisture-resistant, flame-retardant, anti-static, and heat-sealable papers), which consists of an array of high-performance papers designed to bear even the most complex supply chains.

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- The market estimate (ME) sheet in Excel format
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