

## **Asia Pacific Paper Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The Asia Pacific Paper Packaging Market size is worth USD 184.79 Billion in 2025, growing at an 4.92% CAGR and is forecast to hit USD 234.95 Billion by 2030.

The Asia Pacific paper packaging market is set to experience robust growth fueled by swift industrialization, urban expansion, and a heightened consumer focus on sustainable packaging. Major catalysts for this growth encompass:

#### Key Highlights

- The surging use of eco-friendly materials, the booming e-commerce landscape, and an escalating appetite for packaged food and beverages.
- Regional governments are tightening environmental regulations, pushing manufacturers to pivot towards biodegradable and recyclable paper packaging. For instance, China's "National Sword" policy now bans imports of specific waste materials, making way for domestic recycling, including paper. India, with its Plastic Waste Management Rules, is shifting towards paper-based packaging as an alternative for single-use items. Japan's Container and Packaging Recycling Law compels businesses to adopt recyclable materials, further accelerating the move to biodegradable and paper-centric packaging.
- Furthermore, significant growth in online shopping platforms and online shoppers, changing consumer attitudes regarding sustainable packaging, and implementing favorable government policies have increased the demand for paper and paperboard products.
- As e-commerce and food delivery services expand, demand for paper and packaging materials surges. With e-commerce's meteoric rise, the appetite for cardboard and packing materials intensifies. This escalating demand poses challenges for the packaging industry, straining revenue growth and profit margins. Fluctuating raw material prices hinder many packaging companies from operating their plants efficiently. Additionally, these companies grapple with balancing consumer demands, often

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prioritizing projects based on demand rather than efficiency.

- In the Asia Pacific, the paper packaging industry grapples with volatile raw material costs, complicating long-term customer partnerships and earnings forecasts. The industry demands hefty capital investments in equipment, infrastructure, and raw materials. Consequently, production costs heavily influence the profitability and sustainability of paper manufacturers.
- Furthermore, the industry faces mounting pressure from consumers and stakeholders to balance competitive pricing with environmental and social responsibilities. Addressing these concerns often necessitates substantial investments in sustainable practices and technologies, further impacting production costs.

## Asia Pacific Paper Packaging Market Trends

### Food Segment to Hold Significant Market Share

- Paper packaging, praised for its environmental sustainability, is a top choice in food packaging. Products like folding cartons and corrugated boxes are prime options, especially for non-greasy food items. Renowned for their sturdy structures, these boxes ensure reliable transportation of food products. Moreover, corrugated boxes store food in a clean, sealed environment and play a pivotal role in minimizing spoilage risks.
- The booming food delivery sector has amplified the demand for packaging materials, notably paper-based ones. Functional and visually appealing packaging elevates the customer experience, further fueling this demand. In India, delivery platforms like Swiggy and Zomato have forged strategic partnerships with various restaurants, from local eateries to well-known chains. These collaborations broaden the culinary choices available to consumers and cater to a spectrum of tastes and preferences.
- Meanwhile, cloud kitchen platforms like EatClub and EatSure have revolutionized the scene by offering a variety of menus and cuisines from a centralized location. This innovation has significantly expanded food delivery services, driving the demand for paper packaging.
- India's packaged food market is expected to grow from INR 4,240 billion (USD 51.35 billion) in 2022 to INR 5,798 billion (USD 70.3 billion) by 2026, as per the Retailers Association of India, increasing the demand for sustainable packaging solutions. White-top Kraftliner meets this market need by offering strength, food safety compliance, and superior printability.
- AFRY AB's study highlights China's dominance in the global paper industry, accounting for the world's growth in paper and board demand, especially in packaging. Also, China's plastic ban has paved the way for sustainable packaging, bolstering the market for fiber-based products. AFRY projects that in 2030, China's demand for paper and paperboard will swell by 30 million tonnes, translating to a 27% net increase. This growth will further consolidate the concentration of the country's paper industry. The push for sustainable packaging, especially in light of plastic bans, is poised to amplify market growth in the food sector.

### China to Hold Significant Market Share

- China's economy has surged, and its e-commerce landscape has evolved, reflecting the rise in consumer incomes. This growth is driven by widespread smartphone and internet adoption, innovative payment solutions, the popularity of live streaming, and strong governmental support. The expansion of e-commerce in China has significantly influenced the consumer market, reshaped the retail landscape, and transformed the logistics industry, creating a demand for folding cartons and corrugated box packaging products in China.
- Additionally, in March 2024, HSBC Bank reported that more than 60% of China's population prefers online shopping. Furthermore, e-commerce channels account for 37% of retail spending. These figures show the growth of e-commerce trends in China, creating a growth opportunity for the studied market in the country.
- Smart home devices and Internet of Things (IoT) products are gaining traction among Chinese consumers. This surge in demand

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spans smart TVs, speakers, home appliances, and security systems, broadening the horizons of China's electronics market. Furthermore, its intricate supply chain bolsters China's dominance in the electronics arena. With an extensive network of suppliers, logistics, and component manufacturers, Chinese electronics firms can source all their needs domestically. This self-sufficiency strengthens the market and paves the way for growth in packaging solutions like folding cartons and corrugated boxes.

- However, the market growth is impacted by the oversupply of the products. China's paper packaging markets exhibited notable weakness, reflecting the broader challenges faced by the Chinese economy. The demand in these markets remained relatively subdued, driven by low consumer confidence and limited recovery in domestic consumption. Furthermore, the market faced additional pressure from an oversupply of products and a consistent decline in pulp prices. These factors collectively reduced the import and export values of carton boards in China, further highlighting the challenges within the sector.
- Additionally, the Food and Agriculture Organization reported that the import and export of carton boards in China were recorded at USD 1.018 billion and USD 3.435 billion in 2023, which decreased from the value in 2022, resulting in lower growth of the paper packaging market during the forecast period.

## Asia Pacific Paper Packaging Industry Overview

The degree of competition depends on factors affecting the market studied, such as brand identity, powerful competitive strategy, and degree of transparency.

The significant factors governing this force are a sustainable competitive benefit through innovation, levels of market penetration, barriers to exit, power of competitive strategy, and firm concentration ratio.

The level of market penetration is very high, with the application of paper packaging ranging from bulk packaging in industrial applications to single packaging items in e-commerce.

There is increasing competition among local vendors in the market. Buyers can choose from multiple vendors due to the wide range of paper packaging suppliers. Some key market vendors in the region include International Paper Company, Smurfit WestRock, Mondi Group, and Huhtamaki Oyj.

As capital expenditures are high in the market, the barriers to exit are also high. Most prominent players focus on launching more sustainable solutions for the market studied as part of their competitive strategy.

Additional Benefits:

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

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