

EMEA Corrugated Board Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The EMEA Corrugated Board Packaging Market size is worth USD 7.02 Billion in 2025, growing at an 2.91% CAGR and is forecast to hit USD 8.10 Billion by 2030.

Corrugated board packaging is a versatile and cost-efficient method of protecting, preserving, and transporting a wide range of products. Its attributes, such as light weight, biodegradability, and recyclability, have made it an integral component in the packaging industry.

Key Highlights

- Factors such as increasing demand for fresh food and beverages, home and personal products, logistics applications, electronic goods, building consumer awareness toward sustainable packaging, and the growth of the e-commerce industry are expected to increase corrugated box demand in EMEA during the forecast period.
- The e-commerce industry has emerged as a significant player in recent years. Prominent e-commerce companies, such as Amazon, have been using corrugated board boxes as their principal packaging while relying on plastic packaging for individual items. The corrugated board is highly versatile. Thus, it can take various forms other than the box, and due to sustainability issues, it is slowly replacing flexible plastic bags. Moreover, corrugated boxes are a perfect base for several printing techniques.
- The processed food segment accounts for the largest share in terms of the use of corrugated boards. The segment leads the overall market due to the massive prerequisite of foodstuffs being packed, stored, and transported to various places for consumption within and outside EMEA. Also, the need for green packaging materials, particularly paper packaging solutions, is fueled by the enforcement of strict legislation regarding the ban on single-use plastic.
- Germany is one of the prominent European markets for corrugated boxes. The country's principal industries, including pharmaceutical, automotive, food, and electronics, generate a high demand for corrugated boxes. For instance, according to the

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Federal Statistical Office of Germany, revenue from manufacturing corrugated paper and paperboard and containers of paper and cardboard in Germany amounted to approximately USD 24.03 billion by 2023.

- Fluctuations in raw material prices affect the production costs of corrugated products, which decreases the firmness and strength of corrugated boxes. Corrugated packing also has poor fire resistance. Hence, the low strength of corrugated materials and poor barrier properties hinder the growth of the market.

EMEA Corrugated Board Packaging Market Trends

The Processed Foods Segment is Expected to Occupy a Significant Market Share

- The need for convenience foods is anticipated to grow owing to the busy lifestyles in EMEA. Processed food can be cooked in less time, which attracts consumers. The growing population is anticipated to drive the need for processed food, which is convenient and healthy. Additionally, the increasing realization among users regarding the practice of environment-friendly products is expected to drive the demand for corrugated board packaging in the region.
- Government drives to stimulate eco-friendly packaging materials, coupled with the efforts of the Corrugated Packaging Alliance, a corrugated industry initiative to strengthen corrugated packaging, provide an added stimulus to this market's growth.
- According to Statistisches Bundesamt, the German convenience food production business earned USD 6.35 billion in revenue in 2022, which increased to USD 6.35 billion in 2023. The convenience food industry significantly relies on packaging options to guarantee its products' protection and safe transit. As the convenience food production industry in Germany develops, the demand for corrugated board packaging to satisfy these needs will rise.
- Strict legislation banning single-use plastics has intensified the demand for green packaging materials, especially paper-based solutions. The rising popularity of e-commerce platforms in the region further drives market demand. E-commerce has significantly transformed the retail landscape. Key drivers fueling e-commerce's expansion in the Middle East, particularly in the Gulf region, include robust per capita income, advanced transportation and logistics networks, rising internet penetration, and technological advancements.
- The rising appetite for packaged food is increasing the demand for corrugated board packaging. According to Interpack (a packaging trade fair), the Middle East consumes 5% of the world's packaged goods, and its business is rapidly growing. Projections indicate a 21% surge in demand, reaching 44 million tons by 2026. Saudi Arabia, holding just under a 30% share, tops the Middle East in packaged food consumption. Additionally, as more single households lean toward takeaway and delivery services, the reshaped foodservice industry is expected to further propel the growth of the market.

The Beverage Segment is Expected to Hold a Significant Share

- The beverage industry plays an essential role in EMEA. The principal determinants driving the growth of the beverage segment include a steadily growing population, per capita revenue, and improving lifestyles. Due to economic constraints, some brand owners must simplify their pricey packaging. Secondary packaging is a good substitute, and corrugated boxes are among the affordable packaging options.
- As vendors prioritize sustainability, traditional rigid packaging solutions give way to more eco-friendly corrugated board packaging. With the rising demand for customer-centric products and superior product protection, liquid packaging is emerging as a viable and economical choice. This category includes corrugated boards in various sizes and thicknesses tailored to the required protection level.
- The government's activities are anticipated to increase consumer interest in the alcoholic beverage market. According to Kronos AG, a German packaging and bottling machine manufacturer, consumption of packaged beverages in Middle East and Africa is

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expected to increase to 127.1 billion liters by 2024 from nearly 118 billion liters in 2021.

- Brands strategically employ corrugated packaging solutions to differentiate themselves, utilizing various fluting options, thicknesses, and designs tailored to their needs. With a range of customizable printing options, end users can ensure their packages are eye-catching on shelves, driving sales growth.
- The growing demand for milk-based products is boosting market growth as they are packaged in liquid beverage corrugated milk carton boxes. According to the British Soft Drinks Association, in terms of non-alcoholic beverages in the United Kingdom in 2023, carbonated soft drinks took the top position with 38.6%, followed by dilutables, bottled water, and other drinks.

EMEA Corrugated Board Packaging Industry Overview

The corrugated board packaging market in EMEA is fragmented, with many companies offering corrugated board packaging solutions. Corrugated board packaging is a cost-effective solution for safeguarding, preserving, and transporting diverse products. Attributes like lightweight, biodegradability, and recyclability have cemented the corrugated board's role as a cornerstone of the packaging industry. Corrugated boxes provide an ideal canvas for various printing techniques.

The market is dominated by players, including International Paper, DS Smith, Smurfit Kappa, Mondi, WestRock, Saica, Model, and Dunapack packaging. The market is set for consolidation as the big players acquire smaller players to expand their presence and revenue throughout and outside EMEA. Mergers and acquisitions have been among the most adopted strategies; this trend is expected to continue in the coming years. Businesses continually innovate to develop sustainable packaging and render environment-friendly packaging goods. The players are launching corrugated box designs for various end-user industries to leverage market growth opportunities.

Additional Benefits:

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

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