

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

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### **Report description:**

The Europe Paper Packaging Market size is worth USD 95.81 Billion in 2025, growing at an 4.47% CAGR and is forecast to hit USD 119.22 Billion by 2030.

#### 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 industry.
- With the focus shifting toward 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. The surging demand for paper packaging in the e-commerce industry will support market growth.
- The growth in the rate of urbanization across Europe has resulted in a higher focus on sustainability and convenience in food packaging. The increased need for consumer convenience is one of the primary factors driving the market. The foodservice packaging industry has recognized customers' evolving demands and is catering to these changing preferences. Producers are considering how the packaging will be disposed of after usage, resulting in packaging items that can be discarded quickly.
- 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. This 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 for Amazon. Amazon's latest step was 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.

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- 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.

## Europe Paper Packaging Market Trends

### The Beverage Segment is Expected to Hold a Significant Market Share

- Beverages such as fruit juices, alcoholic drinks, and meal replacement shakes use paper packaging solutions. The quality of beverages is affected by pH, storage temperature, pressure, and the presence of contaminants. Changes in the levels can alter the composition of the beverage. Companies are increasingly employing biodegradable packaging products with high barrier resistance (heat, moisture, and bacteria) to eliminate possible oxidation. For instance, When in Rome, a United Kingdom-based company, launched a paper wine bottle for Ocado. The bottle was developed in collaboration with sustainable packaging company Frugalpac. It is made from 94% recycled paper and has an 84% lower carbon footprint than a single-use glass bottle.
- The growing trend of using lightweight packaging material and the rising inclination toward reducing production, shipment, and handling costs are driving the flexible paper packaging of beverages. The demand is driven by the rise of e-commerce companies focusing on visually appealing packaging trends.
- Liquid cartons/tetra packs are one of the fastest-growing packaging types, driven by non-alcoholic beverages. Companies opt for this package type, as it is more modern and attractive than plastic pouches for liquid milk or PET bottles for juices and other beverages.
- Central and Eastern Europe have seen a rise in beverage carton recycling rates, aligning with the EU Packaging and Packaging Waste Regulation. This underscores the industry's dedication to circularity. European carton recycling has already attracted investments totaling around EUR 200 million (USD 216 million), with an additional EUR 120 million (USD 129.6 million) anticipated by 2027.
- In June 2023, Tetra Pak and Stora Enso, through a joint investment of EUR 29 million (USD 31.3 million), commenced a new recycling line in Poland, specifically in Ostroleka. This initiative aims to significantly boost Poland's annual recycling capacity for beverage cartons, with a goal to triple it. The primary focus of this line is the separation of materials from beverage cartons, specifically fibers from polymers and aluminum, which are then recycled into cardboard materials.
- The project aims to not only enhance the recycling process but also to minimize the need for virgin fibers. The anticipated annual capacity of this new line is 50,000 tonnes, which, if achieved, would elevate Poland's annual beverage carton recycling capacity from 25,000 to 75,000 tonnes. Additionally, the project is designed to cater to the increased beverage volumes from countries like Czechia, Hungary, Slovakia, Latvia, Estonia, and Lithuania.

### Germany is Expected to Hold a Significant Market Share

- With the rapidly changing technological environment, the packaging industry is 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 packaging is expected to be in high demand in the business, as it can be used as a plastic substitute.
- Owing to sustainability factors, players in the region are focusing on expanding the capacity of paper-based packaging. In March 2024, Protega Global, a prominent sustainable packaging supplier, bolstered its European supply chain by inaugurating a new distribution center in Numbrecht, Germany. After the Interpack event in Dusseldorf in May 2023, Protega pivoted toward the

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northern European market, marking a pivotal moment in its expansion strategy.

- Protega launched its innovative Hexcel wrap, which is a recyclable paper-based protective packaging positioned as an eco-conscious alternative to traditional plastic bubble wrap. The Hexcel line, including void fill and paper cushioning, is exclusively manufactured in the United Kingdom. This versatile product provides robust protection for a wide array of items, ranging from cosmetics and crockery to gin and jewelry. By transitioning to FSC-certified paper and card packaging, companies can significantly slash their carbon footprint.
- Driven by various government regulations regarding sustainable packaging and growing consumer awareness about the impact of their buying choices on the environment, the demand for paper and paperboard packaging is anticipated to rise during the forecast period. According to Statistisches Bundesamt, in 2023, the German paper packaging market saw a revenue of approximately EUR 14.4 billion (USD 15.70 billion).

## Europe Paper Packaging Industry Overview

The European paper packaging market is semi-consolidated with several influential players. Some of these important players are currently leading the market in terms of market share. These influential players with significant market shares are focused on expanding their customer base abroad. Major players include Smurfit Westrock, DS Smith PLC, Mondi Group, Hamburger Containerboard GmbH, and Metsa Board Oyj.

- July 2024: Smurfit Kappa finalized the acquisition of WestRock, marking the birth of Smurfit WestRock, a global packaging giant. The company's global headquarters will remain in Dublin, the original base of Smurfit Kappa, while its North and South American operations will be centered in Atlanta, WestRock's former hub. Following the merger, Smurfit Kappa's shareholders will hold a controlling 50.4% stake in the rebranded entity. The combined entity, Smurfit WestRock, boasts an extensive network of over 500 facilities and 63 paper mills strategically spread across 40 nations and six continents.
- July 2024: Over the past three years, the British company DS Smith has channeled over EUR 50 million (USD 54 million) into enhancing its packaging facilities in Portugal. These investments primarily focus on technological advancements and the integration of renewable energy solutions. As a key component of this initiative, DS Smith introduced two new fluting machines at its Oporto and Leiria facilities. Additionally, the company bolstered its Lisbon packaging plant by upgrading its corrugator and adding a 2,800 mm wide dry end.

### Additional Benefits:

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

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