

India Paper And Paperboard Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The India Paper And Paperboard Packaging Market size is estimated at USD 13.72 billion in 2025, and is expected to reach USD 18.92 billion by 2030, at a CAGR of 6.63% during the forecast period (2025-2030).

Key Highlights

- Over the past decade, the paper packaging industry has witnessed significant growth, driven by shifts in substrate choices, global market expansions, evolving ownership dynamics, and government-led initiatives to phase out plastics. With an ongoing emphasis on sustainability and environmental concerns, India is poised to see industry trends shaped by various innovations in paper and paperboard packaging.
- Recent advancements in paper-based packaging, especially for food preservation, have been noteworthy. A prime example is the rising popularity of corrugated board packaging for transporting fresh produce. To effectively eliminate bacteria, the layers of the corrugated board must bond at elevated temperatures. Furthermore, the recyclability of these grooved boards allows for repeated use while minimizing the risk of cross-contamination.
- In recent years, many manufacturers have adopted aseptic paper packaging. This process involves sterilizing the food product and its packaging through a hot hydrogen peroxide bath. Such aseptic paper ensures that items like milk, coffee, and fresh produce remain uncontaminated and fresh for extended periods. Reflecting this trend, industry players are increasingly investing in the development of compostable packaging.

Key Highlights

- For instance, in October 2023, Pakka teamed up with Brawny Bear, a date-based food producer sharing Pakka's sustainability vision, to unveil India's inaugural compostable flexible packaging. This launch underscores a significant achievement for Pakka and marks a pivotal moment for India's expansive packaging industry, which boasts a valuation exceeding USD 70 billion.

- Moreover, as the region leans more toward eco-friendliness, sustainable packaging emerges as a crucial player in mitigating the environmental repercussions of packaging materials. Sustainable packaging significantly curtails waste and bolsters the circular economy by utilizing biodegradable, recyclable, and compostable materials. Furthermore, businesses adopting these eco-conscious practices often enjoy heightened customer loyalty, as consumers favor brands that resonate with their environmental beliefs. Such dynamics are fueling the surging demand for paper packaging in India.

- As paper packaging gains traction, Indian paper mills are responding by increasing capital expenditures to diversify into niche products like carry bags and straw paper. In December 2023, Andhra Paper produced barrier-coated products and invested in modernizing its facilities. APL capitalized on its strengths, adjusting its product mix to meet market demands. The company proactively developed and introduced niche offerings, including carry bags and straw paper, alongside value-added products like cup stock, pharma print, and high BF virgin kraft.

- Paper packaging boasts numerous advantages: it's fully recyclable, cost-effective, and generally more eco-friendly than many plastics. Industry data highlights a notable shift, with multiple organizations moving away from plastic-based packaging in favor of sustainable options like paper and sack-based products. Yet, it's crucial to acknowledge the environmental challenges associated with paper packaging, including susceptibility to moisture, higher energy consumption during production, and a larger transportation footprint.

India Paper and Paperboard Packaging Market Trends

Corrugated Packaging is Expected to Hold a Significant Market Share

- Corrugated boxes are essential in e-commerce packaging due to their durability and flexibility. These boxes offer superior product protection through their fluted, structured interior that absorbs impact and resists compression. This ensures products arrive intact, regardless of size or sensitivity. E-commerce packaging utilizes corrugated boxes in various sizes, colors, and weight capacities.

- Due to damaged packaging, corrugated boxes significantly reduce product returns in the e-commerce sector. Their robust construction and protective cushioning minimize the risk of damage during shipping, ensuring products arrive at customers' doorsteps intact. By safeguarding items against mishandling and environmental factors, corrugated boxes improve the overall customer experience, leading to fewer returns and exchanges.

- According to the India Brand Equity Foundation (IBFC), the growth of the e-commerce industry has transformed business in India, opening up various segments such as B2B, D2C, C2C, and C2B. Segments like D2C, B2B, and C2C have experienced significant growth in recent years. The D2C market in India is projected to reach USD 60 billion by 2027.

- The recyclability of corrugated boxes aligns with sustainability goals, appealing to environmentally conscious consumers and enhancing brand reputation. Corrugated boxes are integral components of the e-commerce supply chain in India, providing cost-effective solutions while addressing challenges associated with product returns.

- EBANX reports that online retail sales in India generated USD 103 billion in 2023. As the country's e-commerce industry grows rapidly, corrugated boxes have adapted to meet the increasing demand for efficient and reliable packaging solutions.

- These boxes can be customized to accommodate a wide range of products, from electronics to clothing, ensuring secure transit. Their stackable design also optimizes storage space in warehouses and delivery vehicles, enhancing logistics operations for e-commerce companies.

Food and Beverage is Expected to Show Significant Growth

- Paper and paperboard packaging has become crucial in various sectors of India's food industry, including bakeries and snacks. Paperboard tubes offer several advantages, particularly in packaging dry goods such as spices, tea, and snacks. Their cylindrical shape provides efficient storage and transportation, maximizing shelf space and minimizing waste.
- Paperboard tubes can be customized with vibrant printing and labeling, enhancing brand visibility and consumer appeal. With their eco-friendly and recyclable properties, these packaging solutions align with modern businesses' sustainability goals and appeal to environmentally conscious consumers.
- Food producers, especially prominent FMCG brands, have set ambitious targets to reduce the use of plastics in food packaging and adopt new eco-friendly materials. Consequently, paper-based packaging materials are gaining popularity in India.
- Paper and paperboard packaging aligns with the needs of food service outlets, such as restaurants and fast-food chains. The increasing demand for fast food among India's youth has driven a surge in demand for effective packaging solutions, especially for moist or greasy items like pizza and cakes.
- As of March 31, 2023, India reported 1,816 Domino's Pizza stores across 393 cities. Paperboards, including white line chipboard and solid bleached surface board, provide essential grease-resistant properties for packaging products like pizza. These materials protect against moisture and grease, ensuring the pizza remains fresh and intact during transportation and storage.
- According to Agriculture and Agri-Food Canada news, high-fiber breakfast products in India generated a market value of USD 0.3 billion in 2023. Healthy packaged foods like breakfast cereals and high-fiber snacks benefit from paper and paperboard packaging, which ensures freshness and preserves nutritional value while offering eco-friendly solutions.
- According to Bikaji, in 2022, the estimated market value of packaged food was USD 51.35 billion in India. This was an increase as compared to the previous year. Packaged food's market value will likely increase and reach USD 70.22 billion in 2026.
- The increasing demand for packaged food is driving a parallel need for sustainable, recyclable, and eco-friendly packaging solutions. Paper and paperboard, being biodegradable and renewable materials, are gaining preference over plastic due to growing sustainability concerns.
- This shift toward more environmentally friendly packaging is expected to drive higher consumption of paperboard for boxes, cartons, and flexible packaging in the food industry.

India Paper and Paperboard Packaging Industry Overview

India's paper packaging industry is fragmented and has many players. With the rising demand for packaging applications, many companies are expanding their market presence by increasing their production facilities and product portfolio. The largest companies in this market include WestRock Company, Trident Paper Box Industries, TGI Packaging Pvt. Ltd, Kapco Packaging, and Avon Pacfo Services LLP.

Additional Benefits:

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

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