

Latin America Paper Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Latin America Paper Packaging Market is expected to register a CAGR of 3.9% during the forecast period.

Key Highlights

- Consumers in Latin America are becoming more conscious of the environmental hazards of packaging and moving their purchasing habits to more environmentally friendly options. Consumers, the government, and the media are putting pressure on manufacturers to make their products, packaging, and processes more environmentally friendly. People are willing to pay more for environmentally friendly packaging. The Latin America paper packaging market will grow due to these trends.
- The demand for paper packaging from the food and beverage sector is growing due to the rapid growth of food delivery and ready-to-eat food and the number of customers purchasing supermarket products such as frozen and chilled meals. Furthermore, packaging materials aid in preserving food and nutritional value, all of which contribute to the growth of the paper packaging materials market.
- The overall packaging market in the region is growing, and the paper and cardboard segments play a significant role. Although plastic still dominates the market, due to increasing environmental sustainability concerns, the market is expected to shift to sustainable packaging such as paper. Also, the increasing adoption of lightweight packaging material such as paper in secondary packaging among electronics and personal care products is expected to support the market's growth.
- In the electrical sector, Iron boxes, switches, sockets, and electrical equipment meant for consumer markets prefer corrugated packaging products. Moreover, these packaging products only cover substantial storage space when empty and can be folded. These products are cheaper and cost-effective from a logistics point of view while offering a similar level of protection. Additionally, increasing sales of gaming consoles and video game machines since the COVID-19 pandemic supported the growth of paper packaging in the region. For instance, according to International Trade Centre (ITC), Mexico's exported gaming consoles amounted to more than USD 347 million in 2021, nearly 72% compared to the previous year.

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- The COVID-19 outbreak increased hygiene awareness among consumers in the region and motivated consumers to increase their spending on home care and the hygiene sector to prevent COVID-19 infection. Additionally, during the early spread of the virus, the demand for essential packed food and beverage products surged. Companies struggled to fulfill the rapidly changing demand landscape and faced supply chain disruptions. Furthermore, the rapid rise in e-commerce promoted the growth of paper and paperboard packaging in food, beverage, and online pharmacy and drug store sales, contributing to market growth. Further, the Russia-Ukraine war has an impact on the overall packaging ecosystem.
- The COVID-19 pandemic's consequences on consumer behavior across Latin America led to explosive expansion in the packaging industry. Demand and costs for corrugated boxes rose as consumer preference turned toward e-commerce. Brazilian corrugated cardboard rose 13.5% in April 2021 over April 2020, demonstrating the expansion in this market's demand.

Latin America Paper Packaging Market Trends

Increase in Demand for Paper Packaging in Food Industry

- Due to the rising incomes, urban lifestyle changes, and modern retail trade, the food packaging market is expanding significantly in categories such as bakery products, processed food, frozen processed foods, meal replacement products, condiments, and emerging categories like dairy products, frozen ready-to-eat foods, diet snacks, processed meat, and probiotic drinks.
- Packaging types such as folding cartons are used for packing requirements of diverse sizes and shapes and can be regarded as a pioneer in the food packaging industry. Packaging plays a dynamic and vital role in passing on a product's various benefits and attributes to the consumer at the point of sale.
- Consumer lifestyles in Latin America are increasing demand for ready-to-eat (RTE) foods. According to Food and Drug Regulatory, the rise of grab-and-go meals and ready-to-eat meals is shaping the future of the food packaging trends in the region. For instance, according to Jones Lang LaSalle IP, the market size of food service in Argentina is anticipated to grow 21% from 2018 to last year, which is three times more than the estimates made for Brazil and Chile for 2018 to 2022. In Peru and Colombia, the food service market size could increase by up to 6%, while food service in Mexico could register a growth of 4% during the same period.
- Flexible packagings, such as sacks, kraft paper, coated papers, and paper pouches in the region, is also growing due to recyclability, affordability, lightweight, and growth in packaged foods overall. The demand for packaged foods is growing, and more multinational companies are entering the market in the region.
- In addition to incremental gains in lightweight board grades and introducing recycled paper content, environmental pressures from brands and consumers push the market toward eco-friendly materials.

Brazil is Expected to Register a Significant Growth

- Currently, consumers prefer recyclability and biodegradability as important packaging parameters over reusability. This underlines the growing concerns of consumers about the environmental impact of packaging waste in the future.
- According to certain estimates, nearly more than half of all paperboard packaging is used in food product segments, such as beverages and dairy products, candy and confectioneries, dry foods, and frozen foods. Also, international players are entering the region to expand their customer base and market share. For instance, in September last year, Smurfit Kappa, a corrugated packaging company, agreed and acquired the Brazilian packaging plant, Paperbox. The plant is located in Saquarema, 70 km east of Rio de Janeiro, and the 50,000m² high-tech industrial park has its own logistics fleet.
- In the country, industries such as beverages, clothing, accessories, leather, and accessories were highly impacted by the

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pandemic. However, the demand grew in the industries that use consumer goods, such as food, pharmaceuticals, cleaning, and perfumery. The scope of paper packaging expanded in healthcare and packed food segments, owing to trends like a significant surge in the e-commerce demand.

- According to a survey carried out by the Food and Agriculture Organization of the United Nations (FAO) for the period 2020-2025, the production capacity of wood pulp for paper and paperboard is projected to go up from 23,850 thousand tonnes in 2020 to 29,070 thousand tons in 2025 in Brazil, which will positively impact the demand for paper packaging in the region.

Latin America Paper Packaging Industry Overview

The Latin American market is considerably fragmented, with several major companies like Tetra Laval, MeadWestvaco Corporation, Ranpack Corp, International Paper Company, Mondi Group, Novamont SPA, Stora Enso, and Biopac UK Ltd. The companies continuously invest in strategic partnerships and product developments to gain more market share. Some of the recent developments in the market are:

In July 2022, the containerboard and packaging manufacturer WestRock Co., based in Atlanta, stated that it had reached a deal to acquire the remaining shares of Grupo Gondi for USD 970 million plus the assumption of debt. In light of Grupo Gondi's operations in Mexico, which include four paper mills, nine corrugated packaging plants, as well as six high graphic plants, WestRock claimed that after the transaction is completed, the company will further strengthen its position in the expanding Latin American paperboard, containerboard, consumer, and corrugated packaging markets.

In January 2022, Nexgen Packaging, a global packaging provider, made investments to improve its capacity for production in Latin America. To produce packaging solutions for retailers in Central America, Mexico, and the United States, the company launched a production plant in Queretaro City, Mexico. With these additions, Nexgen will meet the growing demand from manufacturers and retailers while enabling its clients to benefit from trade agreements between the United States, Canada, Mexico, and Central America.

Additional Benefits:

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

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