

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

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Report description:

The Paperboard Packaging Market size is estimated at USD 390.37 million in 2025, and is expected to reach USD 487.41 million by 2030, at a CAGR of 4.54% during the forecast period (2025-2030).

Key Highlights

- Paperboard packaging is the preferred option in the packaged food market. It can be found in various foods, including soups, seasonings, and dairy products. Paperboard is usually covered with polymers or plastics to keep it clean and unspoiled. Compared to glass and metal, it helps reduce the final product's total weight while maintaining the freshness of the food product. Paperboard is the perfect packing material because of its odor and taste neutrality.
- It is becoming increasingly clear that consumers value recyclability and biodegradability over reusability regarding packaging. This indicates a growing concern among consumers about the future environmental impact of packaging waste. More than 60% of communities in the United States collect and recycle paperboard packaging. Companies are also taking steps to introduce recyclable paperboard products. For instance, Cascades has launched a cardboard tray made from recyclable fibers, while SIG has developed cartons made from recycled polymers that use post-consumer waste.
- Furthermore, according to the FAO's (Food and Agriculture Organization of United Nations) report published in November 2023, China's domestic production line in the paper and paperboard sectors is poised to impact global trade dynamics significantly. With a focus on bolstering its manufacturing capabilities, especially in pulp sourcing, China's strategic initiatives pose challenges to international supply chains. Consequently, the paperboard market is anticipated to witness growth, driven by increased demand fueled by China's burgeoning production capabilities and potential exports.
- However, in the first half of 2023, according to the UNECE report, reduced demand and declining prices led to decreased paper and paperboard production in Europe, prompting the closure of several machines. The outlook for producing paper and paperboard in 2023 indicates a 2.7% decline to 90.1 million tonnes. This downtime is likely to impact the paperboard market by

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tightening supply and potentially affecting pricing dynamics.

- Several aspects, including the increasing demand for sustainable and eco-friendly packaging materials, the rise in e-commerce and online shopping, and the growth of the food and beverage industry, drive the development of the paperboard packaging industry. Additionally, technological advancements and manufacturing processes have enabled the industry to produce high-quality and customized packaging solutions that serve the specific needs of different industries and customers.

Paperboard Packaging Market Trends

Increasing Demand from Food and Beverage Segment

- The food and beverage industry is the primary end-user of paperboard packaging, commanding over half of the global market share. The coated, unbleached paperboard has extensive use in packaging beverages, showcasing its versatility and durability. Furthermore, the growing trend towards frozen food consumption is expected to fuel demand for folding carton packaging, presenting additional opportunities for the paperboard packaging market to cater to evolving consumer needs in the food and beverage industry.
- Folding cartons find extensive application within the food and beverage industry, offering a versatile and cost-effective packaging solution for a wide range of products. Folding cartons preserve product freshness for dry goods such as cereals, snacks, and confectionaries while providing ample space for branding and product information. Their lightweight yet sturdy construction ensures efficient storage and transportation, contributing to streamlined logistics operations. Additionally, folding cartons offer consumer convenience through easy opening and reclosing features, enhancing user experience and product longevity on store shelves.
- According to data from the United States Census Bureau, the monthly sales of the US food and beverages store, which generate substantial revenue, underscores the vast consumption within the industry, driving the demand for paperboard packaging. As manufacturers seek sustainable and cost-effective solutions to meet the packaging needs of food and beverage products, the growth of the paperboard packaging market in the country is set to rise.
- Shifts in lifestyle and the increasing number of young consumers are driving a surge in demand for branded and packaged products. According to a news published by Appmysite in February 2024, one in three customers in the United States use online food ordering services at least twice a week. Consequently, the demand for sustainable and versatile packaging solutions, such as paperboard packaging, is expected to rise with the escalating need for convenient and eco-friendly packaging options in the food delivery and retail sectors.
- For instance, in November 2023, Ariake, Japan's leading company of livestock-derived natural seasonings, announced that it would fill food products aseptically in SIG carton packs. Ariake intends to grow its broth portfolio with a new range of premium liquid broths packaged in SIG Slimline carton packs.
- Across countries like India, China, and Japan, the demand for paperboard packaging is propelled by factors including population growth, rising disposable incomes, and an increased focus on sustainability. In India, the burgeoning middle class and regulatory mandates for eco-friendly packaging are boosting demand for paperboard solutions in food and beverage packaging. China's status as a global manufacturing hub and its expanding urban population drive robust demand for paperboard packaging in the food and beverage sector.
- Similarly, in Japan, where sustainability and quality are paramount, the food and beverage industry relies on paperboard packaging to meet consumer preferences for eco-friendly and high-quality packaging solutions. Overall, these countries present significant opportunities for paperboard packaging manufacturers as they cater to the growing needs of the food and beverage industry while aligning with sustainability goals.

North America to Witness Steady Growth Rate

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- North America continues to be one of the leading markets for paperboard packaging products, owing to the presence of many players operating in the country. North America's food and beverage industry heavily relies on paperboard packaging, including folding cartons and corrugated boxes, for its products. These packaging solutions offer durability, versatility, and eco-friendliness, making them ideal for transporting and storing a wide range of food and beverage items. Whether it's cereal box packaging, juice containers, or frozen food packaging, paperboard materials are crucial in ensuring product integrity while maintaining sustainability goals.
- Additionally, the customizable nature of folding cartons allows brands to showcase their products attractively on store shelves, enhancing consumer appeal and driving sales in the competitive market. Furthermore, corrugated boxes serve as essential secondary or tertiary packaging in the North American food and beverage industry, providing additional layers of protection and branding opportunities for products as they move through the supply chain.
- The e-commerce market in North America relies heavily on the paperboard packaging market for safe and efficient product transportation. Corrugated boxes are crucial in safeguarding products during transit, reducing damage, and minimizing returns due to tampered packaging. With the exponential growth of online shopping, ensuring that products reach customers intact is paramount. Corrugated boxes provide sturdy protection against impacts and handle mishaps, maintaining the integrity of goods from warehouse to doorstep. Their customizable design allows for secure packaging tailored to various product sizes and shapes, enhancing efficiency in the logistics chain.
- According to data from the Food and Agriculture Organization of the United Nations, the production capacity of paper and paperboard in 2023 in the United States was 54,183 MT. The consistent production capacity of paperboard in the United States underscores the industry's resilience and stability despite evolving market dynamics. This steady capacity signifies the enduring demand for paperboard products across various sectors, reflecting the nation's robust manufacturing infrastructure and ongoing commitment to meeting domestic and international market needs.
- Growing environmental concerns surrounding plastic usage, coupled with the efforts of organizations and governments to promote sustainable packaging materials, are anticipated to drive the expansion of the paperboard market in the coming years.
- Furthermore, market players increasingly invest in innovative and customized packaging solutions by engaging in mergers and acquisitions or research and development strategies. For instance, in August 2023, PepsiCo announced the adoption of paperboard for beverage multipacks in North America. The company is aiming to make progress on a 2025 recyclability target.

Paperboard Packaging Industry Overview

Paperboard packaging stands out as a robust, lightweight, and versatile solution, all while being cost-effective. Its recyclable nature makes paperboard a prime choice for sustainable packaging, especially when juxtaposed with alternatives like plastic. This adaptability further underscores its suitability across a myriad of end-user industries.

The global paperboard packaging market is highly fragmented. The major players operating in the market are focusing on innovating new products and entering into strategic acquisitions to strengthen their market presence. Some major players operating in the market include Nippon Paper Industries Co. Ltd, Mondi, Metsa Board, WestRock Company, Oji Holdings Corporation, and ITC Limited.

Additional Benefits:

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

Table of Contents:

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1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET INSIGHTS

4.1 Market Overview

4.2 Industry Value Chain Analysis

4.3 Industry Attractiveness - Porter's Five Forces Analysis

4.3.1 Bargaining Power of Suppliers

4.3.2 Bargaining Power of Consumers

4.3.3 Threat of New Entrants

4.3.4 Threat of Substitute Products and Services

4.3.5 Threat of Competitive Rivalry

5 MARKET DYNAMICS

5.1 Market Drivers

5.1.1 Strong demand from the e-commerce sector

5.1.2 Growing adoption of light weighting materials

5.2 Market Restraints

5.2.1 Effects of Deforestation on Paper Packaging

5.2.2 Increasing Operational Costs

5.3 Cartonboard EXIM Scenario

5.3.1 Cartonboard Exports By Value and Volume

5.3.2 Cartonboard Import By Value and Volume

6 MARKET SEGMENTATION

6.1 By Grade

6.1.1 Cartonboard

6.1.2 Containerboard

6.1.3 Other Grades

6.2 By Product Type

6.2.1 Folding Cartons

6.2.2 Corrugated Boxes

6.2.3 Other Types

6.3 By End-User Industry

6.3.1 Food

6.3.2 Beverage

6.3.3 Healthcare

6.3.4 Personal Care

6.3.5 Household Care

6.3.6 Electrical Products

6.3.7 Other End-User Industries

6.4 By Geography

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- 6.4.1 North America
 - 6.4.1.1 United States
 - 6.4.1.2 Canada
- 6.4.2 Europe
 - 6.4.2.1 Germany
 - 6.4.2.2 United Kingdom
 - 6.4.2.3 France
 - 6.4.2.4 Italy
- 6.4.3 Asia
 - 6.4.3.1 China
 - 6.4.3.2 Japan
 - 6.4.3.3 India
- 6.4.4 Latin America
 - 6.4.4.1 Brazil
 - 6.4.4.2 Argentina
 - 6.4.4.3 Mexico
- 6.4.5 Middle East and Africa
 - 6.4.5.1 United Arab Emirates
 - 6.4.5.2 Saudi Arabia
 - 6.4.5.3 South Africa

7 COMPETITIVE LANDSCAPE

- 7.1 Company Profiles
 - 7.1.1 International Paper Company
 - 7.1.2 Mondi Plc
 - 7.1.3 Smurfit Kappa Group
 - 7.1.4 DS Smith Plc
 - 7.1.5 WestRock Company
 - 7.1.6 Packaging Corporation of America
 - 7.1.7 Cascades Inc.
 - 7.1.8 Oji Holdings Corporation
 - 7.1.9 Nippon Paper Industries Co., Ltd.
 - 7.1.10 Rengo Co. Ltd
 - 7.1.11 Graphic Packaging International
 - 7.1.12 Metsa Board Oyj
 - 7.1.13 Sonoco Products Company
 - 7.1.14 Visy Industries
 - 7.1.15 Seaboard Folding Box Company Inc.

8 INVESTMENT ANALYSIS

9 FUTURE OUTLOOK OF THE MARKET

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