SCOTTS INTERNATIONAL

Paper and Paperboard Packaging Market by Grade (SBS, CUK, FBB, WLC, Glassine & Greaseproof, Label Paper), Type (Corrugated Box, Boxboard, Flexible Paper), Source, Pulping, Application (Food, Beverage, Personal & Homecare), & Region - Global Forecast to 2030

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Report description:

The market for paper and paperboard packaging was valued at USD 379.9 billion in 2024, and it is projected to reach USD 451.8 billion by 2030, at a CAGR of 2.9 %. The demand for paper & paperboard packaging is steadily rising due to stricter regulations to reduce the use of plastic and growing environmental consciousness. Many governments now forbid or restrict the use of single-use plastics, which is encouraging companies to use more ecologically friendly alternatives, such as packaging made of paper. The rapid expansion of e-commerce has increased demand for packaging that is both, recyclable and robust enough to support branding through printability. The food and beverage industry is witnessing a surge in the use of biodegradable, food-safe materials in response to consumer preferences for environmentally conscious packaging.

Based on Grade, the glassine & greaseproof segment is expected to account for the highest CAGR during the forecast period
Over the forecast period the glassine and greaseproof segment is expected to grow at the highest CAGR in the paper and paperboard packaging market by grade. This is driven by the increasing demand for sustainable, food-safe, and oil-resistant packaging solutions, especially in the foodservice and bakery segments. Glassine, with its smooth, glossy, and air-tight properties, is used for wrapping confectionery, bakery items, and grease-sensitive products. Its biodegradability and recyclability make it a preferred alternative to plastic-based wraps in line with global environmental goals. Greaseproof paper's oil and moisture resistance makes it ideal for fast food, snacks, and convenience meals. With increasing regulatory pressure to reduce plastic and growing consumer awareness of eco-friendly packaging, manufacturers are increasingly adopting these specialty papers, and hence, their market share is growing and driving segment growth.

Based on type, the flexible paper segment accounted for the highest CAGR during the forecast period
The flexible paper segment is expected to grow at the highest CAGR in the paper & paperboard packaging industry during the forecast period, with its sustainable and high-performance interchangeable functionality continuing to flourish in the food, personal care, and retail sectors. As regulations continue to push legislation to move away from the consumption of plastic, manufacturers are exploring flexible paper alternatives to pouches, wraps, and sachets that provide environmental benefits and functional performance. The increased on-the-go consumption patterns and preference for packaged snack and single-serve items create demand for lightweight, recyclable, and compostable forms of packaging. Flexible paper meets the demands for high-end printing specifications that showcase brand and can also have barrier coatings applied to improve moisture and grease resistance while retaining recyclability. As the demand for sustainable packaging products increases among consumers, combined with the positive advances taking place with coating technologies, flexible paper is positioned well to have an edge as a preferred choice, especially in applications where sustainability and shelf appeal factor into the decision-making parameters.

Based on application, the food segment to hold the largest market share during the forecast period
The food application category is expected to capture the largest market share in the paper and paperboard packaging market over the forecast period as a result of increased growth in demand for sustainable, safe, and functional packaging for a vast range of food applications. The use of paperboard cartons, trays, wraps, and containers is increasing for dry foods, frozen meals, baked goods, snacks, and ready-to-eat food, which all need protection but need good printing surfaces for quality printing and branding. Also, advances in barrier coatings and moisture resistance have opened the doors to increasing paperboard applications that were previously occupied by plastic and foil without compromising food safety and shelf life. The increasing use of eco-friendly 'in a consumer's mind' packaging solutions, particularly in developed economies, and the rise in the consumption of packaged and convenience foods in emerging economies are supporting further growth in this segment. Included in the continued use of paper & paperboard packaging is that the food industry is a huge volume-based sector that requires consistency, cost savings, and packaging that meets regulations. It is clear that the food application category will remain the most significant contributor to the growth of paper & paperboard packaging globally.

Asia Pacific region to hold the largest market share during the forecast period
It is expected that the Asia Pacific will continue to account for a majority of the market share within the paper and paperboard packaging market during the forecast period as well due to many factors such as rapid industrialization, urbanization, and increased consumer demand in economic powerhouses, such as China, India, Indonesia, and Vietnam. The growing middle class and increasing populations lead to increased consumption in food, beverage, personal care, and e-commerce categories, and will become extraordinarily dependent on sustainable, efficient, and affordable packaging solutions for the delivery of products such as food and beverages. China and India are investing extensively in packaging infrastructure and adopting highly advanced technologies as the paper & paperboard industry is one of the highest performing sectors of their economies. Given its abundance of raw materials, low production costs, and strong export capabilities, the Asia Pacific is poised to manage and control worldwide growth and catch up with or stay ahead of developments in consumer markets, environmental policies, and economic engines.

- By Company Type: Tier 1: 55%, Tier 2: 30%, Tier 3: 15%
- By Designation: C Level: 30%, Director Level: 25%, Others: 45%
- By Region: North America: 27%, Europe: 20%, Asia Pacific: 33%, Middle East & Africa: 8%, and South America: 12%.

Companies Covered:
Mondi Group (UK), International Paper (US), Smurfit Kappa (Ireland), NIPPON PAPER INDUSTRIES CO., LTD. (Japan), Amcor (Switzerland), Oji Holdings Corporation (Japan), ITC Limited (India), Metsa Group (Finland)., Clearwater Paper Corporation (US), and Packaging Corporation of America (US) are some of the key players in the paper and paperboard packaging market.

Research Coverage

The market study covers the paper and paperboard packaging market across various segments. It aims to estimate the market size and the growth potential of this market across different segments based on grade, type, source, pulping, application, and region. The study also includes an in-depth competitive analysis of key players in the market, their company profiles, key observations related to their products and business offerings, recent developments undertaken by them, and key growth strategies adopted by them to improve their positions in the paper and paperboard packaging market.
Key Benefits of Buying the Report
The report is expected to help the market leaders/new entrants in this market share the closest approximations of the revenue numbers of the overall paper and paperboard packaging market and its segments and subsegments. This report is projected to help stakeholders understand the competitive landscape of the market, gain insights to improve the positions of their businesses, and plan suitable go-to-market strategies. The report also aims to help stakeholders understand the pulse of the market and provides them with information on the key market drivers, challenges, and opportunities.
The report provides insights on the following pointers:
- Analysis of key drivers (growth in e-commerce packaging demand for recyclable mailers and corrugated inserts, and legislative ban on single-use plastic fuelling substitution with fiber-based formats), restraints (Balancing recyclability with barrier performance in food applications), opportunities (Integration of Smart Packaging Technologies with Paperboard Formats and Adoption of Agro-Residue and Alternative Fibers in Paperboard Production), and challenges (Limited barrier properties compared to plastics and metals) influencing the growth of the paper and paperboard packaging market.
- Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and product & service launches in the paper and paperboard packaging market
- Market Development: Comprehensive information about profitable markets ? the report analyzes the paper and paperboard packaging market across varied regions
- Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the paper and paperboard packaging market
- Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players such as Mondi Group (UK), International Paper (US), Smurfit Kappa (Ireland), NIPPON PAPER INDUSTRIES CO., LTD. (Japan), Amcor (Switzerland), Oji Holdings Corporation (Japan), ITC Limited (India), Metsa Group (Finland), Clearwater Paper Corporation (US), Packaging Corporation of America (US), and others in the paper and paperboard packaging market. The report also helps stakeholders understand the pulse of the paper and paperboard packaging market and provides them with information on key market drivers, restraints, challenges, and opportunities.

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