

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

Market Report | 2025-07-01 | 100 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

E-commerce Packaging Market Analysis

The E-commerce Packaging Market size is estimated at USD 78.39 billion in 2025, and is expected to reach USD 149.82 billion by 2030, at a CAGR of 13.83% during the forecast period (2025-2030).

Volume growth stems from the surge in online retail transactions, where every single-parcel shipment replaces what was once a consolidated store delivery. Regulatory mandates that penalize difficult-to-recycle materials, coupled with rapid advances in automation and fit-to-product design software, continue to propel demand for smarter, lighter, and more sustainable packs. Material substitution toward paper, bioplastic, and mono-material flexible films is accelerating as brands align with new recycled-content quotas while still protecting goods in omnichannel logistics networks. Meanwhile, consumer expectations for premium unboxing experiences force sellers to balance aesthetics with end-of-life circularity, elevating packaging from a cost center to a revenue-generating brand asset.

Global E-commerce Packaging Market Trends and Insights

Explosive Online Retail GMV Growth

E-commerce gross merchandise value continues to climb in double digits worldwide, and every incremental order ships in its protective pack, multiplying packaging demand faster than headline retail sales. China's 165 cross-border pilot zones alone

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scott's-international.com

www.scott's-international.com

processed nearly 20 million packages daily in 2024, underscoring how country-level GMV expansion directly fuels corrugated and mailer consumption. Urban India's quick-commerce operators now target 10-to-15-minute grocery delivery windows, raising packaging-to-product ratios because fragile fresh items ship individually rather than in bulk crates. Subscription commerce further amplifies volumes as recurring shipments deliver monthly replenishments in branded cartons. Longer trade lanes in cross-border commerce, from Shenzhen fulfilment hubs to Western consumers, elevate the need for thicker flute grades and engineered cushioning that can withstand multi-modal handling. These volume and performance shifts anchor the growth trajectory of the global e-commerce packaging market.

Shift Toward Lightweight and Flexible Formats

Courier dimensional-weight pricing penalizes half-empty cartons, pushing sellers to adopt right-sized mailers, collapsible pouches, and gusseted bags that shave airspace and freight spend. Amazon's on-demand packaging initiative trimmed shipping damage 24% and cut outbound freight costs 5% by pairing machine-learning software with auto-baggers that seal film around each order. Lower-margin categories such as fast-fashion rely on flexible poly-mailers to keep packaging costs below 5% of product value, while mono-material films answer recyclability rules without sacrificing density gains. Early adoption is strongest in the United States and Europe, but the trend accelerates in Asia Pacific, where last-mile costs can exceed 30% of total logistics spend. As couriers tighten volumetric pricing, lightweight formats are likely to capture an increasing share of the e-commerce packaging market.

Stringent Plastics Bans and EPR Fees Inflate Costs

Extended Producer Responsibility schemes levy fees that vary with each material's real-world recyclability, doubling the cost of difficult-to-recycle multilayer pouches in some EU markets. California's Plastic Pollution Prevention Act tags flat fees on every kilogram of packaging sold, compelling brands to overhaul portfolios or absorb penalties. Smaller online sellers lacking regulatory staff struggle to complete fee filings, tilting competitive advantage toward integrated players that can spread compliance fixed costs across higher volumes. These financial headwinds pare back the potential CAGR of the e-commerce packaging market over the next two years.

Other drivers and restraints analyzed in the detailed report include:

Sustainability Regulations Accelerating Paper and Bio-Based Adoption / Unboxing Experience as a Brand Channel / Kraft Paper and Resin Price Volatility Squeezes Margins /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Corrugated board captured 51% of the e-commerce packaging market in 2024 thanks to cost efficiency, high stacking strength, and near-universal curbside recyclability. The segment continues to benefit from China's national express-packaging quality standard, which formalizes corrugate flute grades for domestic and export shipments. Meanwhile, bioplastics form the fastest-growing material group at a 14.97% CAGR through 2030, reflecting both regulatory tailwinds and shifting consumer sentiment. Converters blend PLA with post-consumer recycle to create mailers that meet EU 30% recycled-content thresholds without compromising tensile performance. Investments in scalable fermentation facilities across Southeast Asia will gradually lower bio-resin premiums, enabling wider uptake beyond premium cosmetics and organic food sellers.

Brand owners balance corrugated's reliable protection with renewable alternatives to reduce Scope 3 emissions. Although corrugate commands volume, bioplastics bring differentiation; D2C electronics sellers tout compostable film shrink sleeves as a

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

visible sustainability upgrade. Traditional PE and PP operators respond by designing mono-material variants compatible with mechanical recycling, seeking to defend their share. The coexistence of renewable and fossil-based polymers signals a transition, not an overnight swap, ensuring both material clusters remain essential to the e-commerce packaging market.

The E-Commerce Packaging Market Report is Segmented by Material (Plastic, Paper and Paperboard, Corrugated Board, Flexible Films and Mailers, and More), Packaging Format (Boxes and Cartons, Mailers and Envelopes, Protective Packaging, and More), End-User Vertical (Fashion and Apparel, Consumer Electronics, Food and Beverages, Personal Care and Cosmetics, Grocery and Quick-Commerce, and Other End Users), and Geography.

Geography Analysis

Asia Pacific led the e-commerce packaging market with a 52% revenue share in 2024 and is scaling at a 15.70% CAGR through 2030. China's national standard GB 43352-2023 defines mandatory performance metrics for express packs, driving uniform quality expectations across 6 million active online sellers. Concurrently, India's quick-commerce sales triple between 2025 and 2030, elevating demand for lightweight yet durable bags that perform in monsoon humidity. Southeast Asian marketplaces adopt similar rules, leveraging paper cushioning to cut plastic waste, reinforcing regional momentum.

North America ranks second. California's plastic-source-reduction targets and Canada's ban on difficult-to-recycle foam prompt accelerated substrate shifts. Fulfillment centers invest in AI-driven box-selection tools that trim corrugated usage by 12%, supporting both cost and sustainability goals. The United States also incubates cold-chain innovations as online grocery penetration touches 16% in 2025, spurring demand for temperature-stable liners across food and pharma.

Europe remains the global test bed for circularity, with the PPWR's recycled-content and reuse mandates shaping formats that eventually scale worldwide. Retailers in Germany pilot returnable e-grocery crates that cut single-use packs by 80% in dense urban districts. Elsewhere, the Middle East and Africa trail in adoption but record double-digit gains as cross-border platforms extend logistics footprints. Infrastructure gaps and customs complexities temper volume, yet rising smartphone penetration unlocks long-run upside, embedding emerging regions in future expansion of the e-commerce packaging market.

List of Companies Covered in this Report:

Amcor plc / Mondi plc / International Paper / Smurfit Kappa Group / DS Smith plc / WestRock Company / Georgia-Pacific LLC / Sealed Air Corporation / Ranpak Holdings Corp. / Pregis LLC / Klabin SA / Rengo Co. Ltd / Stora Enso Oyj / Nippon Paper Industries / Oji Holdings / Ranpak Holdings Corp / Packhelp SA / Shorr Packaging Corp. / Packsize Intl. / Packsize International /

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

4 MARKET LANDSCAPE

4.1 Market Overview

4.2 Market Drivers

4.2.1 Explosive growth of online retail GMV

4.2.2 Shift toward lightweight and flexible formats to lower DIM-weight costs

4.2.3 Sustainability regulations accelerating paper and bio-based adoption

4.2.4 "Unboxing experience" as a brand-engagement channel

4.2.5 AI-enabled fit-to-product automation reducing material waste

4.2.6 Rapid rise of quick-commerce/subscription retail raising shipment frequency

4.3 Market Restraints

4.3.1 Stringent global plastics bans and EPR fees inflate compliance costs

4.3.2 Kraft paper and resin price volatility squeezes converter margins

4.3.3 Cross-border fulfilment damage/return rates erode ROI on packaging

4.3.4 Carbon-footprint audits forcing redesigns amid data-knowledge gaps

4.4 Value/Supply-Chain Analysis

4.5 Regulatory Landscape

4.6 Technological Outlook

4.7 Porter's Five Forces Analysis

4.7.1 Bargaining Power of Suppliers

4.7.2 Bargaining Power of Buyers

4.7.3 Threat of New Entrants

4.7.4 Threat of Substitutes

4.7.5 Intensity of Competitive Rivalry

4.8 Investment Analysis

5 MARKET SIZE AND GROWTH FORECASTS (VALUE)

5.1 Segmentation by Material Type

5.1.1 Plastic

5.1.2 Paper and Paperboard

5.1.3 Corrugated Board

5.1.4 Flexible Films and Mailers

5.1.5 Bioplastics

5.1.6 Others

5.2 Segmentation by Packaging Format

5.2.1 Boxes and Cartons

5.2.2 Mailers and Envelopes

5.2.3 Protective Packaging (void-fill, cushioning, liners)

5.2.4 Labels, Tapes and Closures

5.2.5 Specialty/Returnable Systems

5.3 Segmentation by End User

5.3.1 Fashion and Apparel

5.3.2 Consumer Electronics

5.3.3 Food and Beverage

5.3.4 Personal Care and Cosmetics

5.3.5 Grocery and Quick-Commerce

5.3.6 Home and Living/Furniture

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.3.7 Other Online Retailers
- 5.4 Segmentation by Geography
 - 5.4.1 North America
 - 5.4.1.1 United States
 - 5.4.1.2 Canada
 - 5.4.1.3 Mexico
 - 5.4.2 South America
 - 5.4.2.1 Brazil
 - 5.4.2.2 Argentina
 - 5.4.2.3 Rest of South America
 - 5.4.3 Europe
 - 5.4.3.1 United Kingdom
 - 5.4.3.2 Germany
 - 5.4.3.3 France
 - 5.4.3.4 Italy
 - 5.4.3.5 Rest of Europe
 - 5.4.4 Asia-Pacific
 - 5.4.4.1 China
 - 5.4.4.2 India
 - 5.4.4.3 Japan
 - 5.4.4.4 South Korea
 - 5.4.4.5 Rest of Asia-Pacific
 - 5.4.5 Middle East and Africa
 - 5.4.5.1 United Arab Emirates
 - 5.4.5.2 Saudi Arabia
 - 5.4.5.3 South Africa
 - 5.4.5.4 Rest of Middle East and Africa

6 COMPETITIVE LANDSCAPE

- 6.1 Market Concentration
- 6.2 Strategic Moves (MandA, capacity, tech)
- 6.3 Market Share Analysis
- 6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share, Products and Services, Recent Developments)
 - 6.4.1 Amcor plc
 - 6.4.2 Mondi plc
 - 6.4.3 International Paper
 - 6.4.4 Smurfit Kappa Group
 - 6.4.5 DS Smith plc
 - 6.4.6 WestRock Company
 - 6.4.7 Georgia-Pacific LLC
 - 6.4.8 Sealed Air Corporation
 - 6.4.9 Ranpak Holdings Corp.
 - 6.4.10 Pregis LLC
 - 6.4.11 Klabin SA
 - 6.4.12 Rengo Co. Ltd
 - 6.4.13 Stora Enso Oyj

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.4.14 Nippon Paper Industries
- 6.4.15 Oji Holdings
- 6.4.16 Ranpak Holdings Corp
- 6.4.17 Packhelp SA
- 6.4.18 Shorr Packaging Corp.
- 6.4.19 Packsize Intl.
- 6.4.20 Packsize International

7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

7.1 White-space and Unmet-Need Assessment

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

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

Market Report | 2025-07-01 | 100 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-05"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

