

Folding Carton Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 121 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:

Folding Carton Packaging Market Analysis

The folding carton packaging market is expected to grow from 43.63 million tonnes in 2025 to 45.53 million tonnes in 2026 and is forecast to reach 56.32 million tonnes by 2031 at 4.35% CAGR over 2026-2031. Sustained demand emerges from stricter legislation that steers brands toward fiber-based substitutes and from e-commerce expansion, which rewards protective formats that also meet recycling mandates. Accelerating premiumization in consumer goods, especially cosmetics and nutraceuticals, magnifies the folding carton packaging market's focus on high-graphic, value-added designs. Recycled-content regulations in the European Union and China raise barriers for low-quality producers, enabling integrated mills to capture share with traceable paperboard grades. Raw-material price volatility narrows margins for non-integrated converters, yet it simultaneously accelerates adoption of recycled fiber streams that deliver more predictable cost structures.

Global Folding Carton Packaging Market Trends and Insights

Sustainability-led Shift to Recyclable Packaging

Brand owners are migrating from plastic toward recyclable board to satisfy investor directives and retail take-back rules. Stora Enso's pledge for 100% recyclable lines by 2030 anchors multi-year volume visibility for the folding carton packaging market. Extended Producer Responsibility fees in the EU raise disposal costs on mixed-material packs, tilting the cost-benefit equation in favor of cartons. The hospitality and industrial sectors echo the shift by swapping plastic inserts for molded fiber partitions. Large

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

retailers align with these targets by preferring fiber-based formats that declare recycled-content percentages on-pack. Together, the moves embed circularity as a procurement prerequisite rather than a marketing option.

E-commerce Packaging Demand Boom

Multichannel giants are redesigning parcel workflows to cut damage rates and freight costs, and folding cartons excel at cube efficiency while supporting full-surface graphics. Amazon's 2024 10-K cites packaging optimization as a core fulfillment pillar, reflecting how design tweaks cascade into network savings. Asia Pacific's surging online grocery and beauty segments amplify demand for tamper-evident, rigid solutions that survive long "first-mile-to-last-mile" journeys. Reverse logistics also favors cartons because integrity retention lowers the percentage of unsaleable returns. As micro-fulfillment hubs proliferate in urban centers, small-format folding cartons that accommodate on-demand picking cycles gain share across household staples.

Virgin Pulp Price and Supply Volatility

Pulp spot prices touched a Producer Price Index level of 219.835 in May 2024, exposing converters that rely on short-term contracts. Mill shutdowns during maintenance cycles tighten supply further, forcing converters to either absorb spikes or pass costs downstream. Integrated majors offset swings by diverting fiber between containerboard and cartonboard machines, yet spot-buying independents face working-capital drains. The resulting spread in cost structures accelerates M&A as sub-scale players seek balance-sheet relief. Hedge-instrument adoption rises, but the effectiveness is diluted by demand unpredictability linked to retail destocking.

Other drivers and restraints analyzed in the detailed report include:

Premiumization and Shelf-Impact Printing Needs
Global Plastic-Reduction Regulations
Substitution by Flexible Pouches

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

Segment Analysis

Healthcare and Pharmaceuticals claimed 17.34% of the folding carton packaging market in 2025 and are poised to climb at a 6.71% CAGR to 2031 on the back of aging demographics and biologic drug launches. Compliance with 21 CFR Part 211 demands tamper-evidence striplines and serialization windows, features readily integrated into folding cartons without adding multilayer complexity. The Food and Beverages category, holding 33.18% of the folding carton packaging market share, sustains volumes through ready-meal adoption and beverage multipacks that benefit from refrigerator-grade coated boards. Meanwhile, Personal Care leans on premium gloss varnishes to anchor shelf differentiation in crowded specialty stores.

Growing clinical trial activity triggers short-run packs that suit digital printing, cutting obsolescence when formulations shift. Carton converters with Class A cleanroom sites out-compete commodity players on contamination control and audit readiness, enabling price premiums even as input costs rise. For mass-market foods, portion-controlled cereal and snack trays rely on lightweight chipboard, underpinning baseline volume and cushioning overall demand swings driven by economic cycles.

The Folding Carton Packaging Market Report is Segmented by End-User Industry (Food and Beverages, Household, Personal Care and Cosmetics, Healthcare and Pharmaceuticals, Tobacco, and Electrical and Hardware), Material Type (Solid Bleached Board, and More), Printing Technology (Offset Lithography, Digital, and More), and Geography (North America, Europe, and More). The Market Forecasts are Provided in Terms of Volume (Tonnes).

Geography Analysis

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Asia Pacific maintains clear leadership with 38.42% of the folding carton packaging market share in 2025 and is advancing at a 6.82% CAGR as omni-channel retail deepens in China, India, and Indonesia. Chinese converters upscale machinery to meet domestic electronics exporters' stringent burst-strength targets, and government mandates on biodegradability accelerate the adoption of PFAS-free coatings. Japanese premium carton demand rises as convenience-store meal kits proliferate and require freezer-grade board. Meanwhile, South Korea's recyclability grading scheme further standardizes fiber packaging inputs and incentivizes high-yield deinking lines.

North America sustains growth through direct-to-consumer subscription brands that need small-batch cartons with vibrant graphics. International Paper's USD 9.9 billion DS Smith acquisition provides coast-to-coast converting nodes, trimming freight miles, and enhancing responsiveness to regional CPG demand surges. Canadian bans on difficult-to-recycle plastics redirect frozen entrees and dairy products back into cartonboard sleeves. Mexico's near-shoring of electronics assembly escalates demand for ESD-safe carton inserts, pulling imports of virgin Kraft liner from United States mills.

Europe remains innovation-centric, with the Packaging and Packaging Waste Regulation forcing full recyclability by 2028 and eliminating fluorinated barriers by August 2026. Germany, France, and the United Kingdom pioneer digital embellishment lines that marry metallic effects with water-based inks, aligning luxury visual targets with environmental mandates. Eastern European converters secure EU funding to update corrugators, yet cartonboard remains the format of choice for confectionery exports due to its higher shelf impact. The new regulatory certainty galvanizes CapEx in next-generation coating kitchens, nudging flexible-film users to reconsider fiber alternatives for long-shelf-life SKUs.

List of Companies Covered in this Report:

Smurfit Westrock plc Graphic Packaging International LLC Mayr-Melnhof Karton AG DS Smith plc International Paper Company Stora Enso Oyj Georgia-Pacific LLC Mondi plc Huhtamaki Oyj Seaboard Folding Box Co. Inc. (Vidya Brands) American Carton Company All Packaging Company Edelmann GmbH CCL Healthcare (CCL Industries Inc.) Rengo Co., Ltd. Sonoco Products Company Autajon Group Southern Champion Tray

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
- 4 MARKET LANDSCAPE
 - 4.1 Market Overview
 - 4.2 Market Drivers
 - 4.2.1 Sustainability-led shift to recyclable packaging
 - 4.2.2 E-commerce packaging demand boom

- 4.2.3 Premiumization and shelf-impact printing needs
- 4.2.4 Global plastic-reduction regulations
- 4.2.5 Digital printing enables short-run micro-targeting
- 4.2.6 Meal-kit and ready-meal subscriptions surge
- 4.3 Market Restraints
 - 4.3.1 Virgin pulp price and supply volatility
 - 4.3.2 Substitution by flexible pouches
 - 4.3.3 Limited recycling for barrier cartons
 - 4.3.4 PFAS-free coating compliance costs
- 4.4 Industry Value 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 Geopolitical Impact Analysis

5 MARKET SIZE AND GROWTH FORECASTS (VOLUME)

- 5.1 By End-user Industry
 - 5.1.1 Food and Beverages
 - 5.1.2 Household
 - 5.1.3 Personal Care and Cosmetics
 - 5.1.4 Healthcare and Pharmaceuticals
 - 5.1.5 Tobacco
 - 5.1.6 Electrical and Hardware
- 5.2 By Material Type
 - 5.2.1 Solid Bleached Board (SBB)
 - 5.2.2 Coated Unbleached Kraftboard (CUK)
 - 5.2.3 White-lined Chipboard
 - 5.2.4 Folding Boxboard
- 5.3 By Printing Technology
 - 5.3.1 Offset Lithography
 - 5.3.2 Digital (Inkjet / Electrophotography)
 - 5.3.3 Flexography
 - 5.3.4 Gravure
 - 5.3.5 Other Printing Technology
- 5.4 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

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

5.4.2.3 Rest of South America

5.4.3 Europe

5.4.3.1 Germany

5.4.3.2 United Kingdom

5.4.3.3 France

5.4.3.4 Italy

5.4.3.5 Spain

5.4.3.6 Russia

5.4.3.7 Rest of Europe

5.4.4 Asia Pacific

5.4.4.1 China

5.4.4.2 Japan

5.4.4.3 India

5.4.4.4 South Korea

5.4.4.5 Australia and New Zealand

5.4.4.6 Rest of Asia Pacific

5.4.5 Middle East and Africa

5.4.5.1 Middle East

5.4.5.1.1 Saudi Arabia

5.4.5.1.2 United Arab Emirates

5.4.5.1.3 Rest of Middle East

5.4.5.2 Africa

5.4.5.2.1 South Africa

5.4.5.2.2 Egypt

5.4.5.2.3 Rest of Africa

6 COMPETITIVE LANDSCAPE

6.1 Market Concentration

6.2 Strategic Moves

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 for key companies, Products and Services, and Recent Developments)

6.4.1 Smurfit Westrock plc

6.4.2 Graphic Packaging International LLC

6.4.3 Mayr-Melnhof Karton AG

6.4.4 DS Smith plc

6.4.5 International Paper Company

6.4.6 Stora Enso Oyj

6.4.7 Georgia-Pacific LLC

6.4.8 Mondi plc

6.4.9 Huhtamaki Oyj

6.4.10 Seaboard Folding Box Co. Inc. (Vidya Brands)

6.4.11 American Carton Company

6.4.12 All Packaging Company

6.4.13 Edelmann GmbH

6.4.14 CCL Healthcare (CCL Industries Inc.)

6.4.15 Rengo Co., Ltd.

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

6.4.16 Sonoco Products Company

6.4.17 Autajon Group

6.4.18 Southern Champion Tray

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

Folding Carton Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 121 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*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-03-03
		Signature	

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com



Scotts International. EU Vat number: PL 6772247784

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