SCOTTS INTERNATIONAL

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

Market Report | 2026-02-09 | 110 pages | Mordor Intelligence

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Report description:

Canada Paper Packaging Market Analysis

The Canada paper packaging market size in 2026 is estimated at USD 20.23 billion, growing from 2025 value of USD 19.07 billion with 2031 projections showing USD 27.21 billion, growing at 6.1% CAGR over 2026-2031. Corrugated transit cases, folding cartons with water-based barriers, and kraft delivery bags are gaining traction as federal single-use plastics bans, provincial extended producer responsibility rules, and e-commerce parcel growth converge to shift demand toward fiber substrates. Brand owners are redesigning packs to comply with the federal Plastics Registry, while converters invest in lightweight fluting and digital print to cut freight costs and differentiate limited-edition runs. The July 2024 Smurfit WestRock merger sharpened scale advantages in linerboard integration, prompting regional players to focus on short-run specialty and barrier-coated grades. Near-term risks include volatile northern bleached softwood kraft pulp prices and energy inflation, yet sustained consumer appetite for take-away meals, cosmetics, and direct-to-consumer subscriptions keeps order books solid.

Canada Paper Packaging Market Trends and Insights

Rising Adoption of Circular Economy Mandates

British Columbia's 2024 EPR launch obliges producers to finance curbside collection and hit 75% paper packaging recovery by 2026, pushing converters to boost recycled-content capacity. Ontario and Quebec are phasing in similar schemes through 2026, creating a compliance mosaic that rewards companies with centralized reporting systems. The federal Plastics Registry layers additional reporting, steering procurement toward fiber substrates exempt from registry fees. Cascades leverages EPR credits to offset recovered-fiber costs and fund mill upgrades. Smaller converters lacking data-management depth face consolidation pressure as compliance overhead rises.

Government Bans on Single-Use Plastics

Environment and Climate Change Canada's national prohibition on selected single-use plastic items reached full enforcement in 2024, eliminating roughly 1.3 million tonnes of waste per year. Quick-service chains swapped plastic clamshells for molded-fiber and kraft solutions, spurring demand for grease-resistant coatings that remain recyclable. Anti-greenwashing rules in Bill C-59 impose fines for unverified environmental claims, driving adoption of FSC and SFI certifications on fiber packs. Corrugated and paperboard thus gain resilience even as reusable pilots test closed-loop serviceware models.

Volatile Pulp Prices

Northern bleached softwood kraft pulp traded between USD 1,050 and USD 1,250 per tonne in 2024, compressing margins for converters without long-term supply contracts. Integrated mills such as Graphic Packaging shield folding-carton costs by producing internal pulp. Currency swings amplify exposure because pulp is bought in USD while sales occur in CAD. Climate-related supply shocks are likely to keep volatility elevated, nudging non-integrated players toward mergers or niche specialty grades.

Other drivers and restraints analyzed in the detailed report include:

Surge in E-Commerce Parcel VolumesRetailers' Preference for Shelf-Ready PackagingHeightened Competition from Reusable Plastics

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

Segment Analysis

Corrugated board accounted for 54.05% of 2025 revenue as the default for tertiary transit, maintaining its hold on e-commerce and retail distribution channels. Lightweight fluting introduced by Smurfit WestRock trims basis weight while preserving edge-crush strength, cutting freight costs. Paperboard's 7.21% forecast CAGR reflects cosmetics and OTC pharmaceutical brands migrating from plastic clamshells to folding cartons with bio-based coatings that comply with Health Canada migration limits. Kraft paper supports food-delivery wraps and void fill, while molded-fiber inserts protect electronics and eggs. Water-based barriers from Michelman enable moisture and grease resistance without hindering MRF sorting. The Canada paper packaging market benefits as mills invest in dual-coating lines, broadening substrate options for direct food contact.

Paperboard's advance also tempers corrugated reliance, diversifying revenue streams and cushioning pulp-price shocks. Integrated mills use recycled-fiber furnish to cut carbon intensity, aligning with Scope 3 reporting expectations. As retail-ready trays merge transit and display roles, grade flexibility gives converters competitive latitude. The Canada paper packaging market thus positions corrugated for steady growth while allowing paperboard to capture higher-margin personal-care and healthcare niches.

Corrugated boxes and folding cartons held a 64.78% share in 2025, underscoring their widespread use in consumer goods and industrial shipments. Right-sizing technology customizes corrugated dimensions for direct-to-consumer orders, lowering void fill and dimensional-weight fees. Flexible packs, poised for an 8.30% CAGR, attract snack, pet-treat, and single-serve condiment categories that value resealability and lightweight freight. Supremex added pouch-making lines with child-resistant features to meet pharmaceutical serialization laws. Digital inkjet presses print unique QR codes and seasonal graphics without incurring plate costs, supporting limited-run production.

Paper pouches nested in corrugated sleeves blend portability with impact resistance, meeting the needs of premium coffee and confectionery products. Regulatory scrutiny on laminates propels the use of mono-material papers with dispersion barriers. As e-commerce brands seek to add unboxing flair, rigid interiors pair with flexible exteriors to create layered experiences. The Canada paper packaging market embraces this convergence, balancing structural integrity with consumer-driven design agility.

The Canada Paper Packaging Industry Report is Segmented by Material Type (Kraft Paper, Paperboard, Corrugated Board, and More), Product Type (Flexible Paper Packaging, and Rigid Paper Packaging), Packaging Format (Primary Packaging, Secondary Packaging, and More), and End-Use Industry (Food, Beverage, Healthcare and Pharmaceuticals, and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Cascades Inc. Smurfit WestRock Graphic Packaging Holding Company Crown Holdings Inc. Tetra Pak International SA Canadian Kraft Paper Industries Limited Maritime Paper Products Limited Partnership McNairn Packaging Limited Planet Paper Box Group Inc. Advance Paper Box Ltd. Supremex Inc. Kruger Packaging L.P. Amcor plc Mondi plc International Paper Company Rengo Co. Ltd. Sappi Limited Sealed Air Corporation Pratt Industries Inc.

Additional Benefits:

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

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