

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

Market Report | 2026-02-09 | 137 pages | Mordor Intelligence

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Report description:

Europe Paper Market Analysis

Europe paper market size in 2026 is estimated at 74.07 million tonnes, growing from 2025 value of 71.14 million tonnes with 2031 projections showing 90.62 million tonnes, growing at 4.12% CAGR over 2026-2031. Despite inflationary energy costs and digital substitution in graphic grades, the Europe paper market continues to expand on the back of strict circular-economy regulation, e-commerce packaging demand, and a post-pandemic rise in tissue consumption. Accelerated adoption of recycled fiber keeps material input risk in check and reinforces the bloc's strategic push for resource sovereignty. Meanwhile, vertically integrated leaders redirect graphic capacity toward higher-margin packaging grades to defend profitability. Supply-side dynamics remain tight as wood-pulp prices in Sweden jumped 30% in 2024, prompting procurement strategies that favor long-term contracts and diversified fiber sourcing.

Europe Paper Market Trends and Insights

Growth in Use of Sustainable Packaging

Mandatory recyclability targets under Regulation 2025/40 require all packaging sold in the bloc to be recyclable by 2030, pushing brand-owner demand sharply toward fiber-based formats. Mondi already derives 87% of revenue from reusable, recyclable, or compostable solutions, signalling how compliance has turned into a premium-priced value proposition. Corrugated converters report order backlogs even in a sluggish macro environment, indicating that sustainability now outweighs cost in purchasing

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criteria. Incremental capital has shifted toward molded-fiber trays for food service, a segment benefiting from plastic bans across member states. As OEMs scramble for low-carbon credentials, mill certifications around traceability and recycled content serve as gatekeepers to retail shelf space.

Expansion of E-commerce and Food-service Demand

Online retail requires up to three times more corrugated volume per transaction than store-based sales, adding structural tonnage growth to the Europe paper market. Parallel growth in takeaway and delivery meals inflates demand for grease- and moisture-resistant wraps. Mills have responded by installing on-demand flexo and ink-jet lines that cost-effectively customise small batches, lowering inventory risk for e-tailers. Urban micro-fulfilment hubs now specify easy-fold case designs that improve pick-pack efficiency and reduce void space. Together, these channels offset soft demand in legacy commercial print, underscoring packaging's role as the ballast of Europe paper market resilience.

Volatile Wood-Pulp and Recovered Paper Prices

Swedish roundwood cost inflation of 30% in 2024 eroded mill margins and exposed the vulnerability of non-integrated producers to commodity swings. Geopolitical constraints on Russian and Belarusian fiber imports have tightened the regional supply pool, pushing mills to secure multiyear offtake contracts or acquire forest assets outright. Recovered paper collection costs also escalated due to driver shortages and higher diesel prices, narrowing the price advantage versus virgin pulp. Vertical integration now confers a decisive hedge, illustrated by Stora Enso's partial forest divestiture balanced by long-term stumpage agreements. Without pricing power in commoditized grades, smaller independents risk negative cash flow during spikes, underscoring raw-material volatility as the most acute operational headwind.

Other drivers and restraints analyzed in the detailed report include:

EU Circular-Economy Mandates on Fiber Packaging
Rising Hygiene-Paper Consumption Post-COVID
Digital Media Substitution of Graphic Papers

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

Segment Analysis

Case Materials represented 33.78% of Europe paper market share in 2025, underpinning the packaging backbone that services e-commerce, food, and industrial supply chains. Corrugated case grades captured downstream migration from graphic mills, adding low-cost capacity without green-field lead times. Producers leveraged lightweighting technology to cut grammage while maintaining stacking strength, aligning with retailer sustainability scorecards. Specialty Papers, though just 8.92 million tonnes in 2025, deliver a 5.95% CAGR, buoyed by food-grade barrier coatings, security substrates, and technical laminates for electronics. These niches command price premiums that offset higher formulation costs and compliance testing, making them an attractive diversification play for large integrated houses.

The structural headwinds facing Graphic Papers remain unabated; nonetheless, premium magazines and art books continue to demand tactile quality beyond digital screens, preserving a viable albeit shrinking niche. Sanitary and Household papers benefit from defensive demand characteristics and ongoing hygiene awareness. Wrappings and Carton Board capitalise on retailer plastic-bag bans and omnichannel retail packaging redesigns. Looking ahead, industrial printing innovation such as water-based flexo for Case Materials introduces new value-added revenue streams, cementing the central role of Case Materials in the Europe paper market.

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Recycled Fiber accounted for 52.64% of Europe paper market size in 2025, confirming the region's leadership in closed-loop material flows. Collection systems supported by Extended Producer Responsibility schemes achieve recovery rates that outpace most other regions. As eco-design criteria evolve, converters redesign packaging for de-inkability and fiber retention, reinforcing recycled fiber throughput. Virgin Fiber usage posts the fastest 4.34% CAGR, owing to premium packaging where organoleptic purity and tear resistance are non-negotiable. Integrated forest companies exploit certified forestry assets to supply these segments, often pairing primary pulp with increased recycled content elsewhere to meet overall sustainability targets.

Agro-Residue Fiber remains nascent but garners interest as mills pilot wheat-straw and miscanthus pulping to diversify procurement risk and lower carbon intensity. Continental policy that tightens deforestation traceability requirements further elevates recycled and alternative fibers' relative attractiveness. Meanwhile, mill trials on enzymatic de-inking show promise in lifting recycled-fiber brightness, expanding its applicability in premium white grades, and bolstering the circular narrative that underpins the Europe paper market.

The Europe Paper Market Report is Segmented by Product Type (Graphic Papers, Case Materials, Sanitary and Household, Wrappings, Carton Board, and Specialty Papers), Raw-Material Source (Virgin Fiber, Recycled Fiber, and Agro-Residue Fiber), Basis-Weight (Below 90 Gsm, and More), End-Use Industry (Packaging and Industrial, and More), and Geography (Germany, and More). The Market Forecasts are Provided in Terms of Volume (Tonnes).

List of Companies Covered in this Report:

Stora Enso Group UPM-Kymmene Corporation Smurfit Westrock plc Mondi plc Metsa Group Holmen AB Svenska Cellulosa Aktiebolaget SCA Mayr-Melnhof Karton AG PRINZHORN HOLDING GmbH Norske Skog ASA Burgo Group S.p.A Lecta Group Reno de Medici S.p.A Sappi Limited Grigeo AB Iberpapel Gestion S.A Heinzl Group Fedrigoni SpA Arctic Paper S.A

Additional Benefits:

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

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